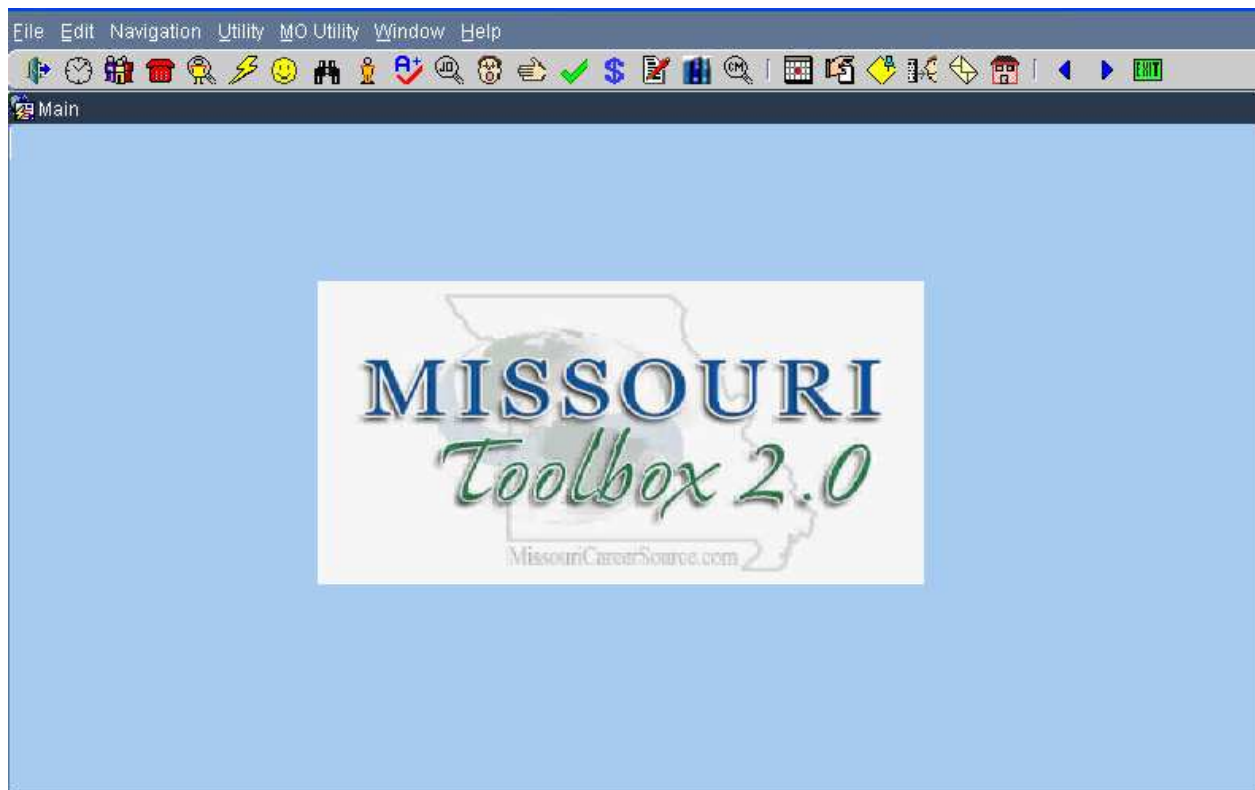


MISSOURI TOOLBOX 2.0 DESK AID



Career Assistance Program (CAP) Procedure Manual

Table of Content

(In)Active Case Management	4
<i>Active Case Management</i>	4
<i>(In)Active Case Management</i>	4
(Un)Restrict Records.....	5
<i>Restrict Records</i>	5
<i>(Un)Restrict Records</i>	5
Agent Hats.....	6
<i>Changing Hats</i>	6
Alerts.....	7
<i>Issuing Manual Recipient Alerts</i>	7
<i>Issuing Manual Applicant (Good Cause) Alerts</i>	9
<i>Deleting Alerts from ‘Daily Referrals Query’</i>	11
<i>Deleting Alerts from ‘Seeker Services Tab’</i>	12
Assessment.....	14
<i>Work History</i>	15
<i>Teen Parent in an Educational Activity</i>	15
Case Management Search.....	17
<i>Search of Active CAP Clients by Counselor</i>	17
<i>Search of CAP Recipients or Applicants</i>	18
<i>Sorting Data Results</i>	19
<i>Reassigning a Primary Counselor</i>	21
Case Management Transfer Clerk.....	22
<i>Different Type of Case Transfer Clerks</i>	22
<i>Transferring a Case to Another Office</i>	23
<i>Retrieving a Case from Another Office</i>	25
<i>Reassigning a Case from Another Office</i>	29
<i>Reassigning a Task to Another Counselor</i>	34
Case Notes.....	39
<i>Entering/Adding a Case Note</i>	39
<i>Deleting a Case Note</i>	41
<i>Editing a Case Note</i>	43
Employment Plan.....	46
<i>Printing the Employment Plan</i>	46
Enrollment.....	47
<i>Enrolling a Client into CAP</i>	47
FSD Load Information Tab.....	49
FSD TANF Participation Tab.....	50
<i>FSD TANF Participation Tab</i>	50
<i>AWE/CWEP, Community Service, and Core/Non-Core Hours</i>	52
Generic O*Net Code.....	53
Immediate Engagement (IE).....	55
Letters.....	57
<i>Issuing Call-In Letters</i>	57
<i>Reviewing Call-In Letters</i>	59

<i>Editing/Resending Call-In Letters</i>	61
<i>Deleting Call-In Letters</i>	63
<i>Free Form Letters</i>	66
<i>Issuing Post-Enrollment Letters</i>	67
<i>Reviewing Post-Enrollment Letters</i>	68
<i>Deleting Post-Enrollment Letters</i>	71
MQ Search.....	74
Office Locations.....	77
<i>Changing Office Location Log In</i>	77
Seeker.....	78
<i>Searching for a Record</i>	78
<i>Entering Seeker Information</i>	80
Seeker Services Tab.....	81
Services.....	84
<i>Entering Services into the Employment Plan</i>	84
<i>Pre-Enrollment Conciliation Service</i>	87
Teen Parent.....	89
<i>Identifying a Teen Parent</i>	89
<i>Sending a ‘Teen Parent in an Educational Activity’ Alert</i>	90
<i>Sending a ‘Teen Parent Not in an Educational Activity’ Alert</i>	91
Transportation Related Expense (TRE)	92
<i>Authorizing Applicant TRE</i>	92
<i>Authorizing Recipient TRE</i>	94
Two Parent.....	96
<i>Identifying a Two-Parent Household</i>	96
<i>Two-Parent Button</i>	96
<i>Entering the Default O*Net Code</i>	98
Verification Screen.....	99
<i>Entering Actual Hours</i>	100
<i>Entering Projected Hours</i>	102
<i>Entering Self-Employment Hours</i>	104
<i>Entering Excused Absences and Holiday Hours</i>	106
Work History.....	108
<i>Entering a Work History</i>	108
<i>Sending ‘Employment Obtained’ Alert</i>	109
<i>Sending ‘Verification of Termination’ Alert</i>	111
Work Related Expense (WRE)	112
<i>Authorizing WRE Payments for Recipients</i>	112
<i>Reconciling WRE Payments</i>	115

Activate/Inactivate Case Management

Use this functionality to activate/inactivate records for case management purposes.

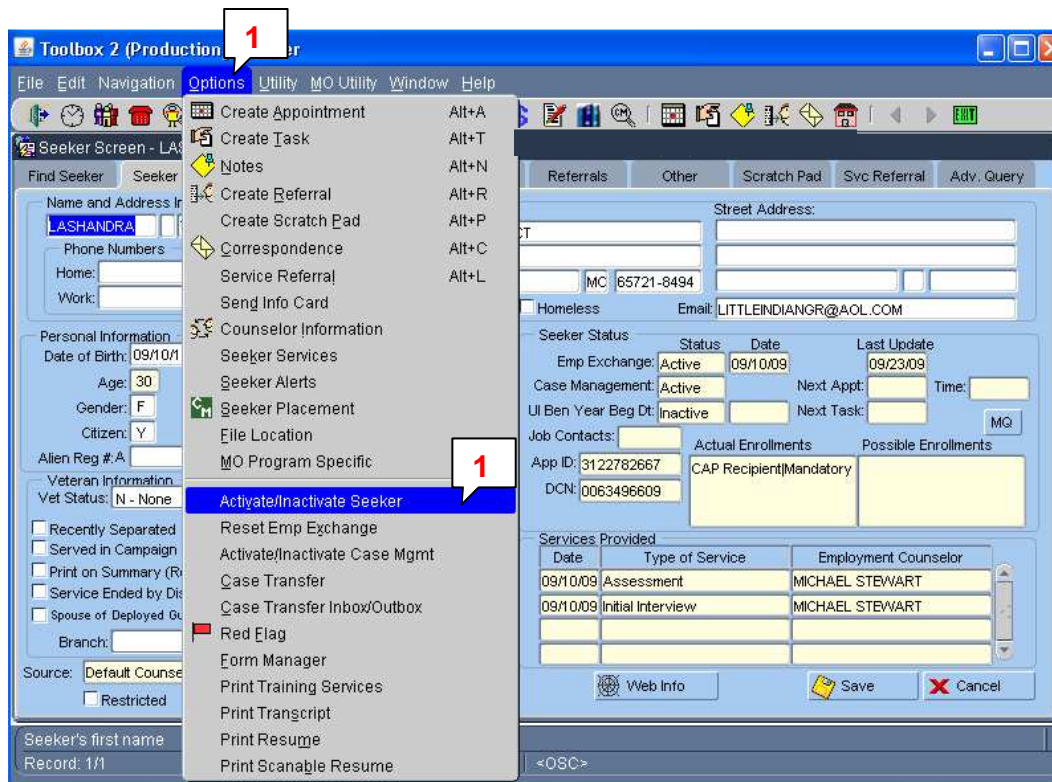


Figure 1: Options Menu/Activate-Inactivate Case Mgmt

Step-by-Step:

1. From the **Options** menu, select **Activate/Inactivate Case Mgmt**.

NOTE: This is an on/off feature. If activate Case Mgmt is selected, re-select to deactivate.

Restrict/Un-restrict Records

Use to restrict or un-restrict a record to comply with the “Domestic Violence” policy.

The screenshot shows the 'Toolbox 2 (Production) - Seeker' window. The 'Seeker Info' tab is active. The form contains the following information:

- Name and Address Information:** LASHANDRA TAYLOR, 1530 S TUSCANY CT, OZARK, MO 65721-8494. Email: LITTLEINDIANGR@AOL.COM.
- Personal Information:** Date of Birth: 09/10/1979, Age: 30, Gender: F, Citizen: Y, LEP: [blank].
- Seeker Status:** Status: Active, Date: 09/10/09, Last Update: 09/23/09. Case Management: Active, Next Appt: [blank], Time: [blank]. UI Ben Year Beg Dt: Inactive, Next Task: [blank].
- Job Contacts:** App ID: 3122782667, DCN: 0063496609.
- Services Provided:** 09/10/09 Assessment, MICHAEL STEWART; 09/10/09 Initial Interview, MICHAEL STEWART.
- Restricted:** Checked.

Figure 1: Find Seeker Module/Seeker Info Tab

Step-by-Step:

1. Click on **Find Seeker** icon.
2. On the **Seeker Info** tab, the **Restricted** field controls the Domestic Violence alert.
 - To 'restrict' the record, check the **Restricted** field.
 - To 'un-restrict*' the record, uncheck the **Restricted** field.

Note: When this field is checked or unchecked, an automatic alert is sent to notify FSD of the customer's Domestic Violence status. For further clarification, refer to the “Applicant Alerts” or “Recipient Alerts” policy. Also, only certain staff has the Toolbox 2.0 capability to un-restrict records.

Agent Hats

Changing agent hats.

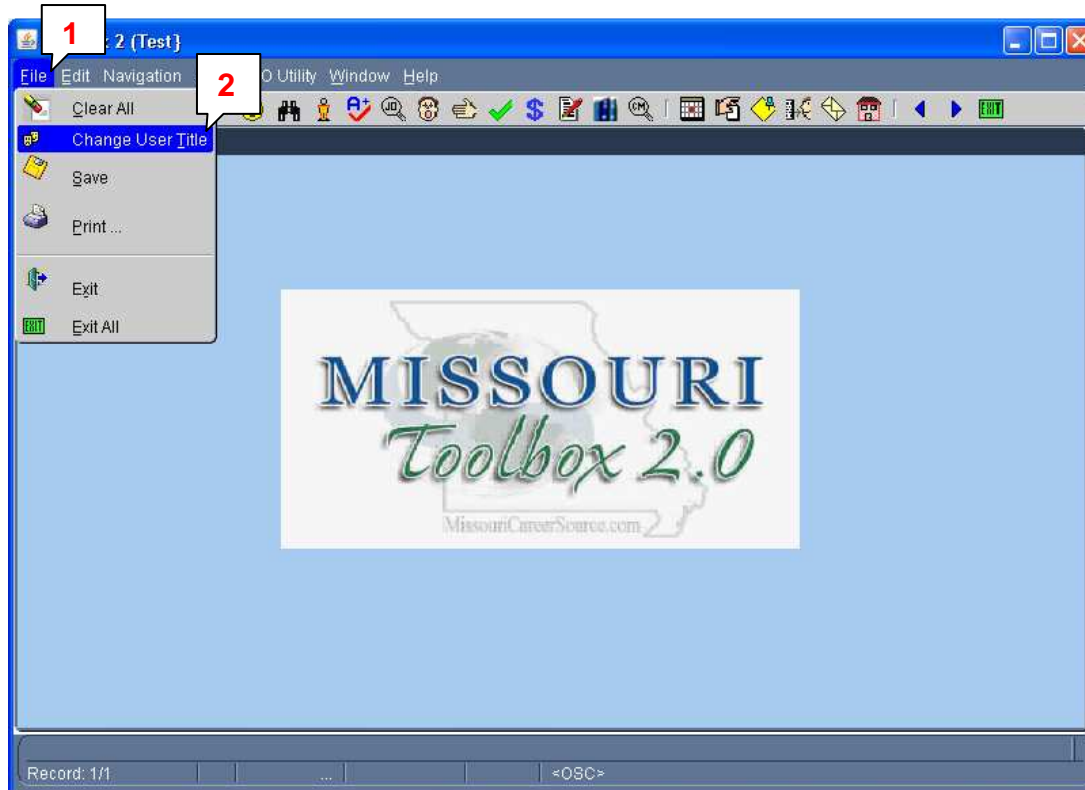


Figure 1: Splash Screen/File Menu/Change User Title Option

Step-by-Step:

1. While on the **Splash** screen, click on the **File** menu.
2. Select the **Change User Title** option. The **Change Agent Hat** screen will appear.

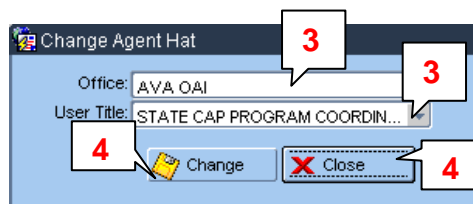


Figure 2: Change Agent Hat Screen

3. Select the appropriate **Office** and **User Title** from the drop-down menus.
4. Click on the **Change** button and then the **Close** button to make the change and close the screen.

Issuing Alerts

Issuing a manual Recipient alert to be sent to FSD.

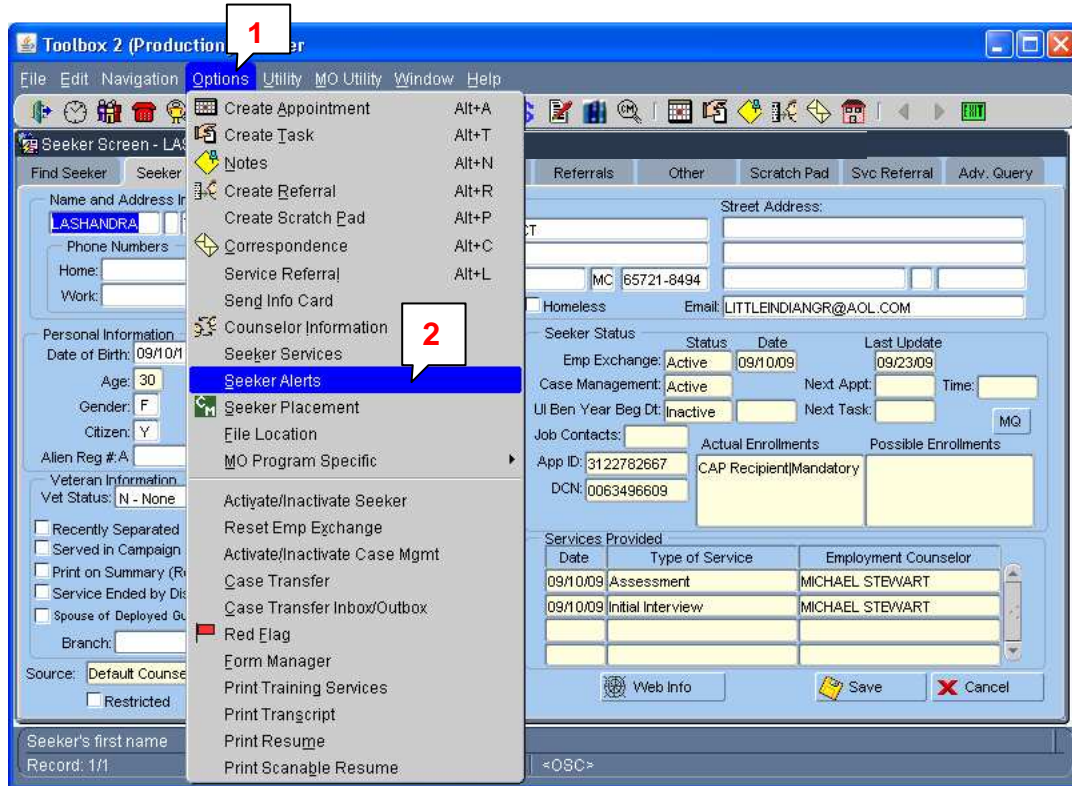


Figure 1: Options Menu/Seeker Alerts Option

Step-by-Step:

1. With a client's record open, click on the **Options** menu.
2. Select **Seeker Alerts** option.

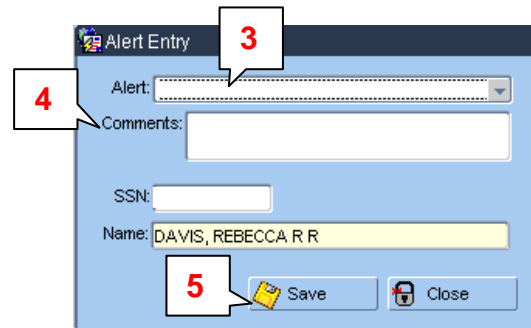

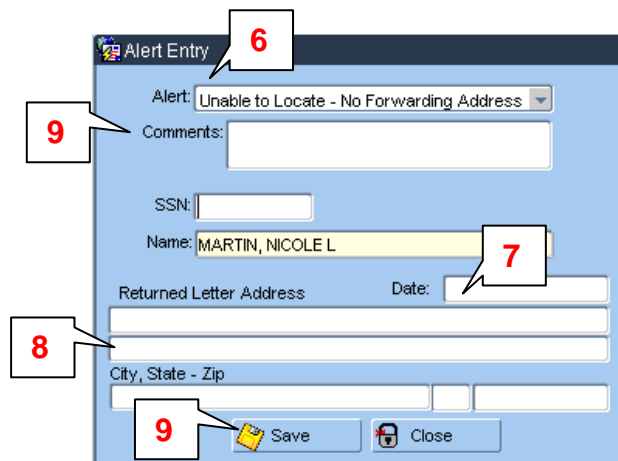


Figure 2: Alert Entry Screen


3. From the **Alert Entry** pop-up screen, select the appropriate alert from the **Alert** field:
 - a. Age 60 and Over
 - b. Custodial Caretaker of a Child Under 12 Months
 - c. Mentally or Physically Disabled
 - d. Needed at Home to Care for Disabled Family Member
 - e. Notify FSD to Being Sanction Process
 - f. Parent Type Change
 - g. Recommends Sanction be Lifted
 - h. Unable to Locate – No Forwarding Address
 - i. Volunteer Not Participating

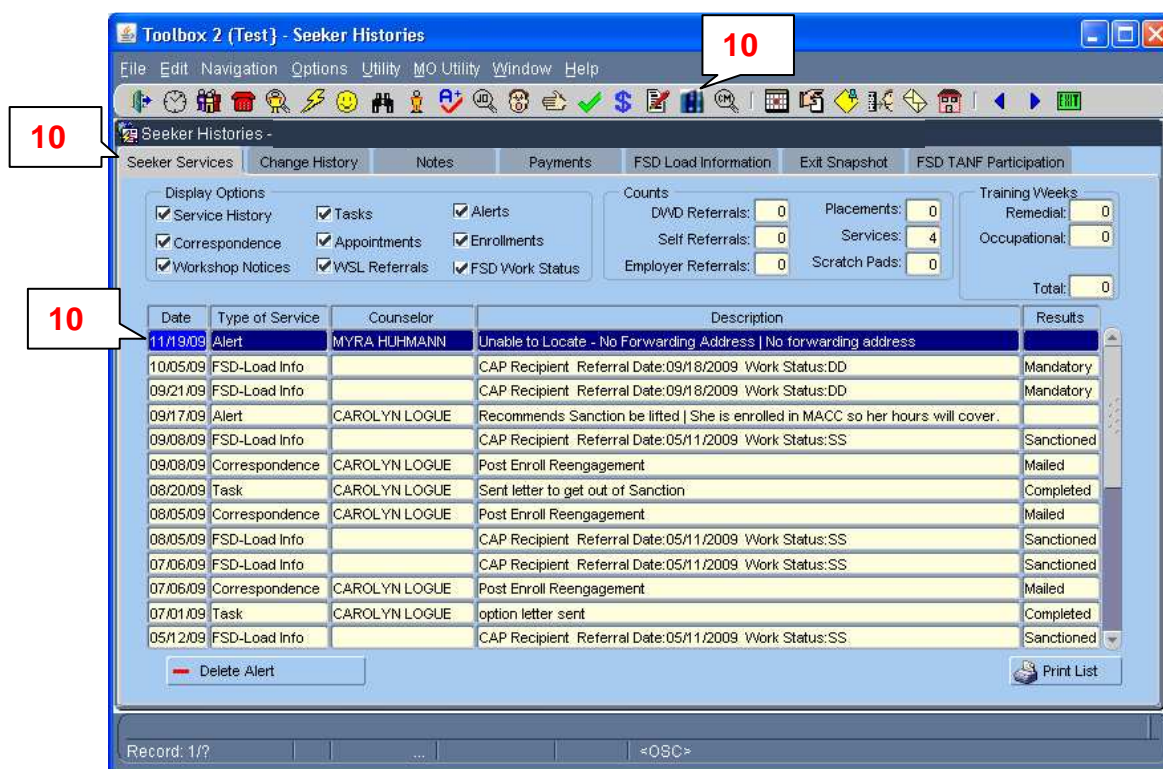
4. Enter any necessary information into the **Comments** field.
5. Click on the  **Save** button to save the information and to send the alert to FSD. This alert will write to the **Seeker Services** tab within the **Seeker History** module.



The screenshot shows the 'Alert Entry' window. Callout 6 points to the 'Alert' dropdown menu which is set to 'Unable to Locate - No Forwarding Address'. Callout 9 points to the 'Comments' text area. Callout 7 points to the 'Date' field. Callout 8 points to the 'Returned Letter Address' and 'City, State - Zip' fields. Another callout 9 points to the 'Save' button at the bottom right.

Figure 3: Alert Entry Screen (Unable to Locate-No Forwarding Address)


6. The 'Unable to Locate – No Forwarding Address' alert screen contains additional fields that are required to be completed before the alert can be sent.
7. In the **Date** field, enter the date the CAP letter was returned.
8. In the **Returned Letter Address** and **City, State – Zip** fields, enter the address listed on the returned CAP letter.
9. As necessary, complete the **Comments** field and click the  **Save** button to send the alert.



The screenshot shows the 'Seeker Histories' window with the 'Seeker Services' tab selected. Callout 10 points to the 'Seeker Services' tab. Another callout 10 points to the first row of the history table.

Date	Type of Service	Counselor	Description	Results
11/19/09	Alert	MYRA HUHMANN	Unable to Locate - No Forwarding Address No forwarding address	
10/05/09	FSD-Load Info		CAP Recipient Referral Date:09/18/2009 Work Status:DD	Mandatory
09/21/09	FSD-Load Info		CAP Recipient Referral Date:09/18/2009 Work Status:DD	Mandatory
09/17/09	Alert	CAROLYN LOGUE	Recommends Sanction be lifted She is enrolled in MACC so her hours will cover.	
09/08/09	FSD-Load Info		CAP Recipient Referral Date:05/11/2009 Work Status:SS	Sanctioned
09/08/09	Correspondence	CAROLYN LOGUE	Post Enroll Reengagement	Mailed
08/20/09	Task	CAROLYN LOGUE	Sent letter to get out of Sanction	Completed
08/05/09	Correspondence	CAROLYN LOGUE	Post Enroll Reengagement	Mailed
08/05/09	FSD-Load Info		CAP Recipient Referral Date:05/11/2009 Work Status:SS	Sanctioned
07/06/09	FSD-Load Info		CAP Recipient Referral Date:05/11/2009 Work Status:SS	Sanctioned
07/06/09	Correspondence	CAROLYN LOGUE	Post Enroll Reengagement	Mailed
07/01/09	Task	CAROLYN LOGUE	option letter sent	Completed
05/12/09	FSD-Load Info		CAP Recipient Referral Date:05/11/2009 Work Status:SS	Sanctioned

Figure 4: Seeker History Module/Seeker Service Tab

10. To verify an alert was sent, access the **Seeker Services** tab within the  **Seeker History** module. The alert will write in the "history".

Issuing Alerts

Issuing a manual Applicant (Good Cause) alert to be sent to FSD.

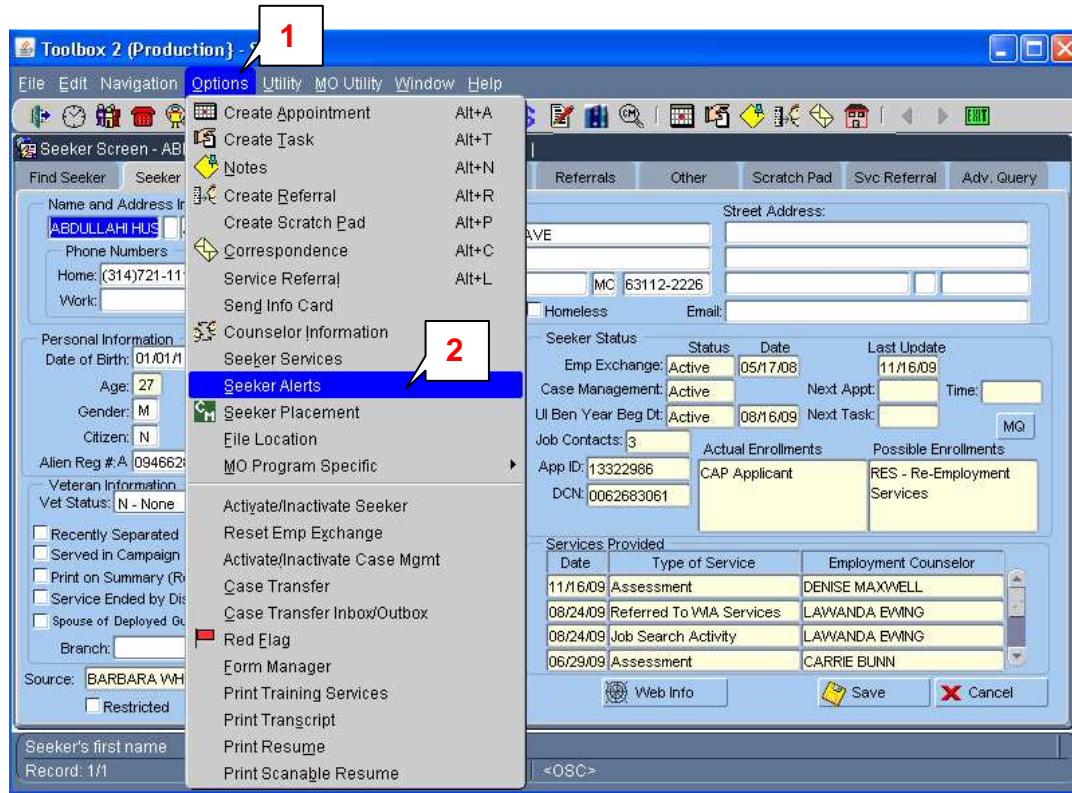


Figure 5: Options Menu/Seeker Alerts Option

Step-by-Step:

1. With a client's record open, click on the **Options** menu.
2. Select **Seeker Alerts** option.

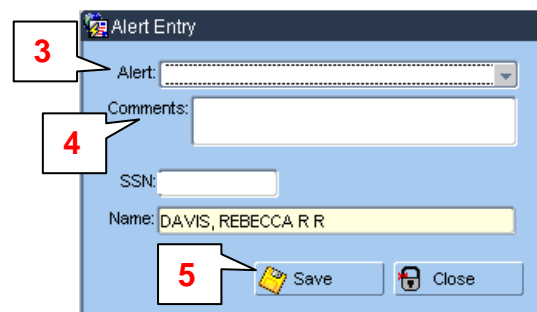



Figure 6: Alert Entry Screen

3. From the **Alert Entry** pop-up screen, select the appropriate alert from the **Alert** field:
 - a. Breakdown in Childcare
 - b. Breakdown in Transportation
 - c. Court-Required Appearance/Incarceration
 - d. DWD Not Available to Provide Services
 - e. Emergency Family Crisis
 - f. Lack of Identified Social Services
 - g. Refused a Bona-fide Offer of Employment
4. Enter any necessary information into the **Comments** field.

- Click on the  **Save** button to save the information and to send the alert to FSD. This alert will write to the **Seeker Services** tab within the **Seeker History** module.

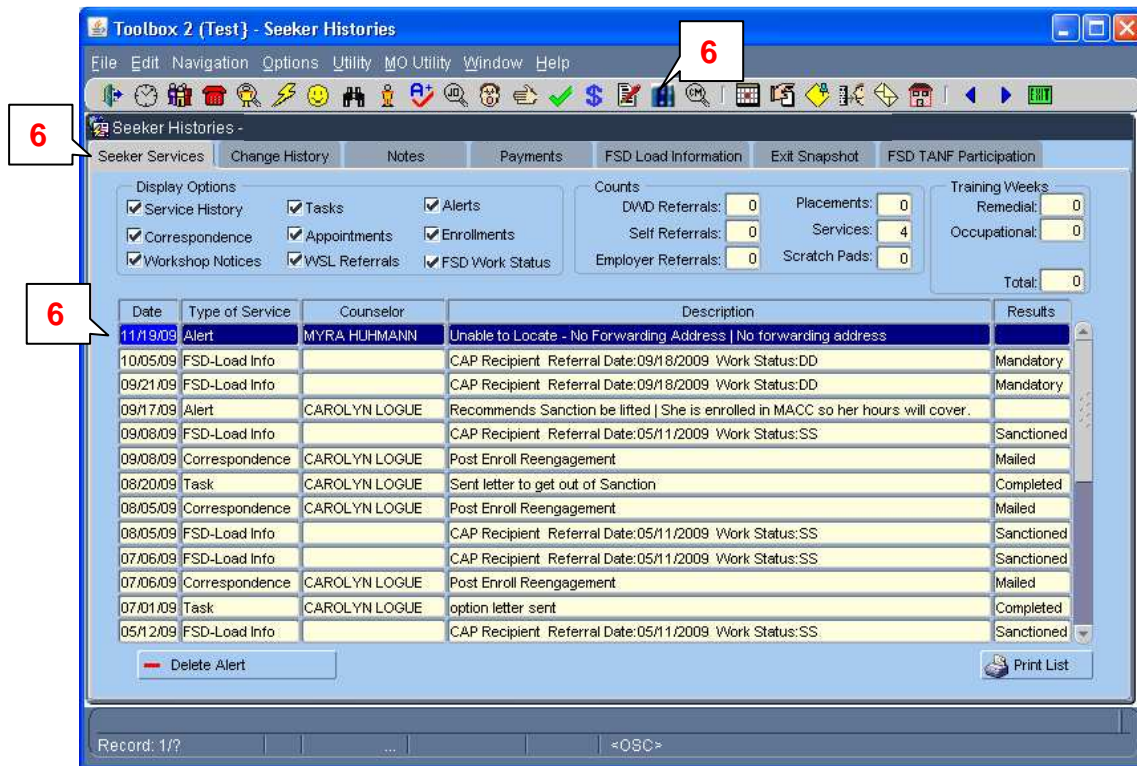



Figure 7: Seeker History Module/Seeker Service Tab

- To verify an alert was sent, access the **Seeker Services** tab within the  **Seeker History** module. The alert will write in the “history”.

Deleting Alerts from 'Daily Referrals Query'

Deleting alerts to be sent to FSD. An alert can be deleted up to 4:00pm the same day it was issued.

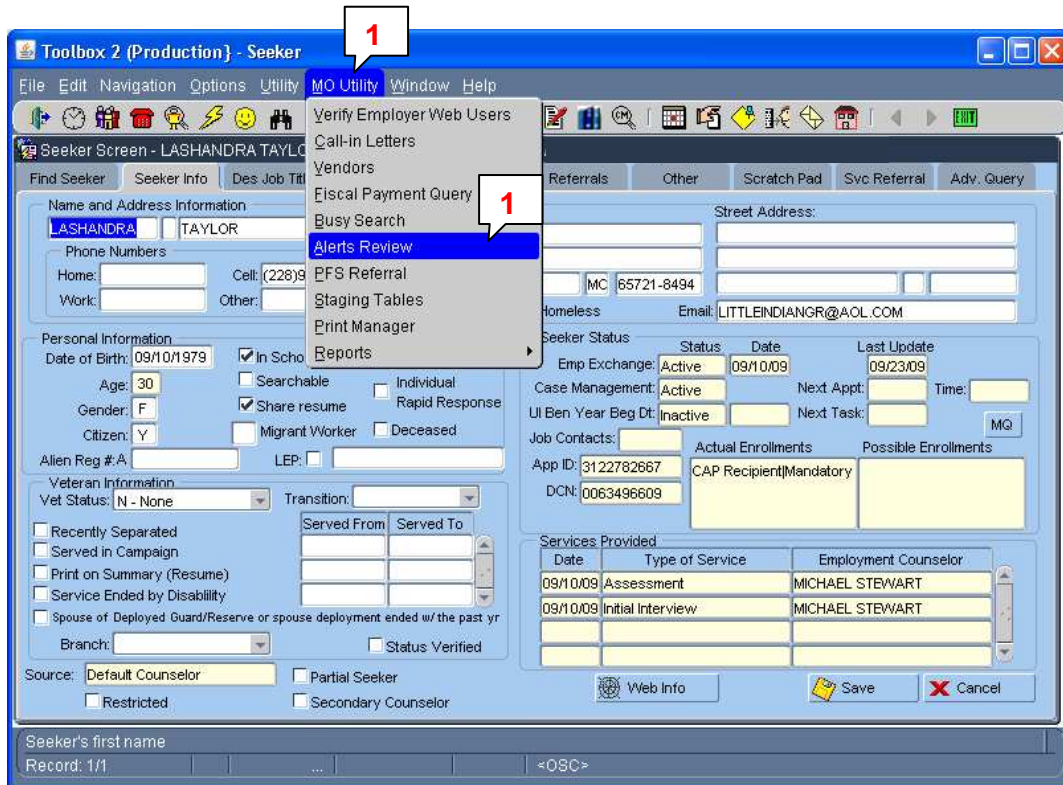


Figure 1: MO Utility Menu/Alerts Review Option

Step-by-Step:

1. From the **MO Utility** MO Utility menu, select **Alerts Review**.

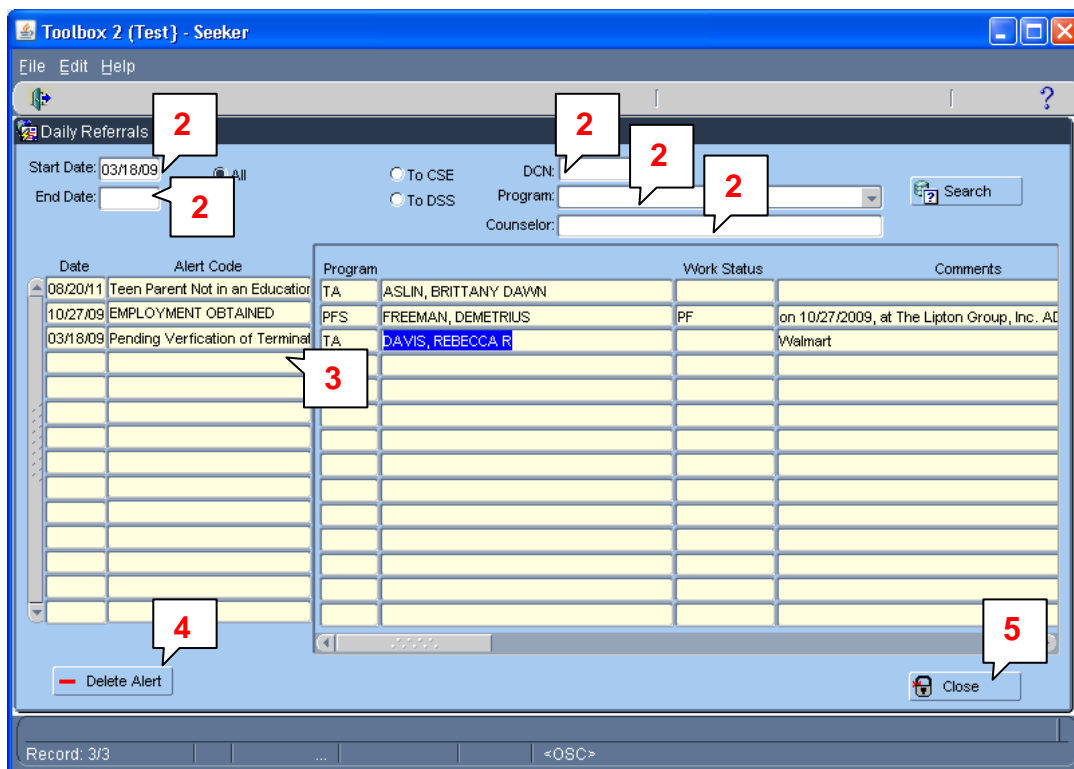

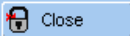


Figure 2: Daily Referral Query Screen

2. Using the fields **Start Date**, **End Date**, **DCN**, **Program**, and **Counselor**, do a search to find the alert you want to delete.
3. Highlight the alert you want to delete.
4. Click on the  button to delete the alert.
5. Click on the  button to close the screen.

Deleting Alerts from 'Seeker Services Tab'

Deleting alerts to be sent to FSD. An alert can be deleted up to 4:00pm the same day it was issued.

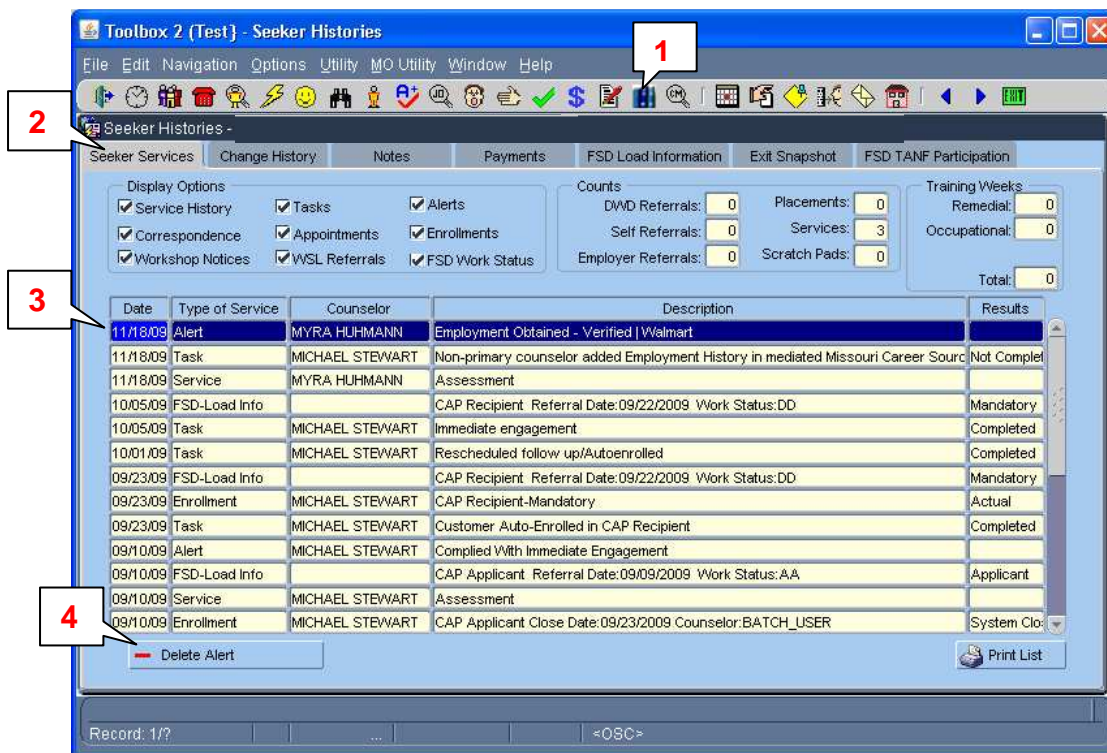

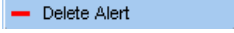


Figure 3: Seeker History Module/Seeker Services Tab

Step-by-Step:

1. Click on  **Seeker History** icon.
2. Access the **Seeker Services** tab.
3. Highlight the alert you want to delete.
4. Click the  **Delete Alert** button to delete the alert.

NOTE: For information regarding the Immediate Engagement (IE) alert, please reference the Immediate Engagement section of the desk aid.

Assessment

Completing the assessment for a CAP client.

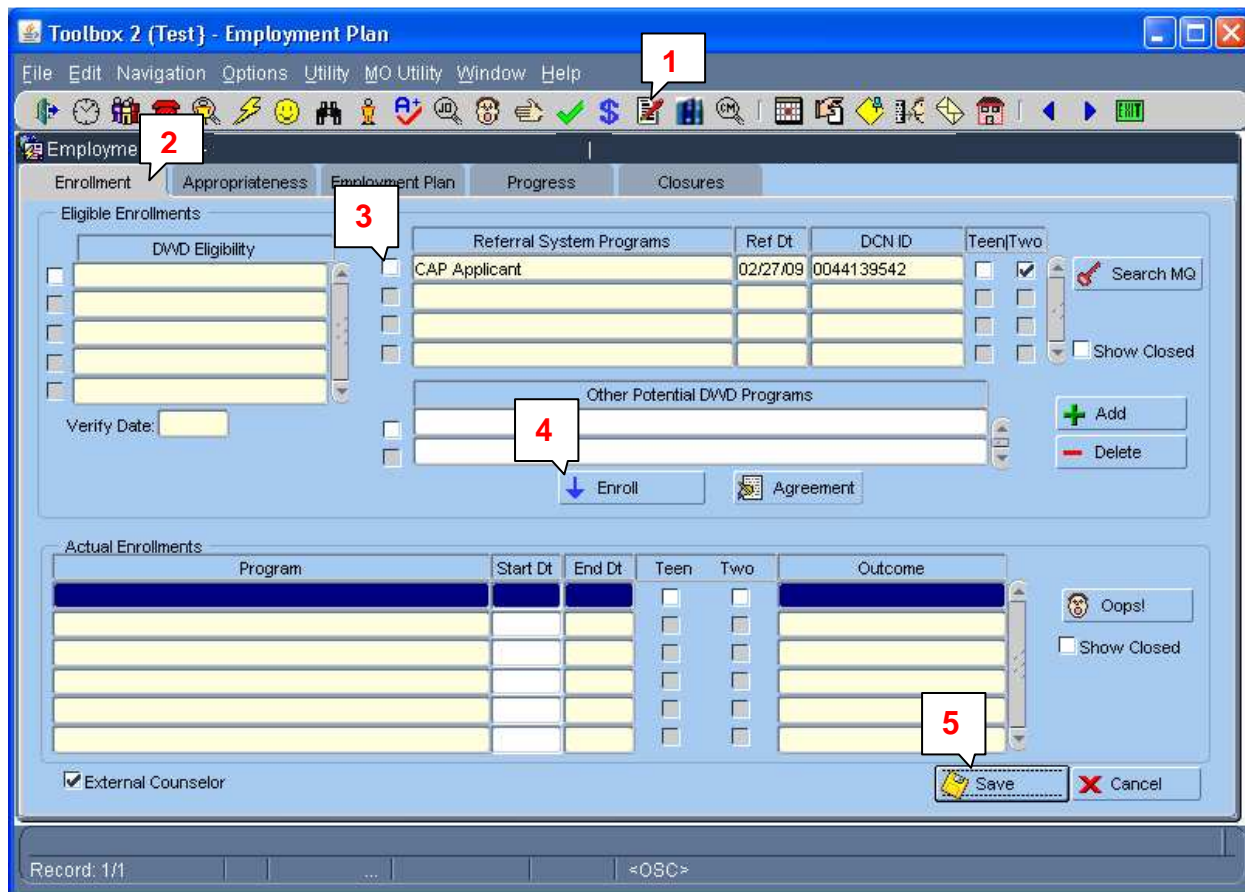
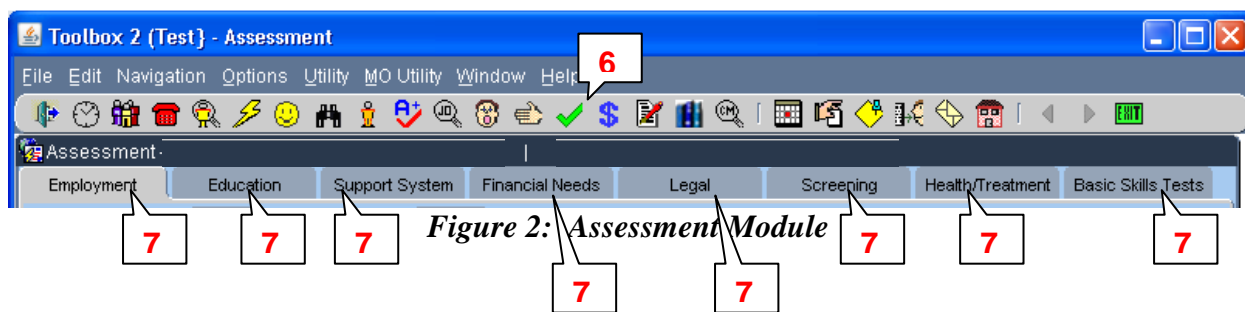


Figure 1: Employment Plan-Enrollment Module/Enrollment Tab

Step-by-Step:

1. Click on **Employment Plan/Enrollment** icon.
2. Access the **Enrollment** tab.
3. Under the section **Referral System Programs**, check/click the field to the left of the CAP Applicant or CAP Recipient referral.
4. Click the **Enroll** button to enroll the client into the CAP program. The referral will move from the **Referral System Programs** section to the **Actual Enrollments** section.
5. Click on the **Save** button to save the enrollment.



6. Click on **Assessment** icon.

7. Based on the client's answers to the 'TA Applicant Assessment', complete all necessary tabs within the **Assessment** module. The tabs include **Employment**, **Education**, **Support System**, **Financial Needs**, **Legal**, **Screening**, **Health/Treatment**, and **Basic Skills Tests**.

Toolbox 2 (Test) - Assessment

File Edit Navigation Options Utility MO Utility Window Help

Assessment Date: 12/31/08 Last Update Date: 12/31/08

Employment History

Employer	City	St
Johnson Controls	St. Joseph	MO
United States Marine Corps	USA	PA

Job Title: Manufacturing Supervisor

Start Date: 06/01/07 End Date: 12/01/08 Months: 18

Per: Salary: Hrs. Wk.:

Job Description: Supervise at least 50 staff members at a time on 12 assembly lines. In charge of dispatching maintenance

Current Employment

Currently Working: Not Work... When are you able to work:

Looking for work: Yes Production Supervisor, Maintenance Mgr.

Type of work:

Longest Worked Employer: Why Left:

Applied and Not Hired:

Can't Look/Accept Job:

Quit or Fired Reason:

Job Seeking Skills

Do you have a resume? Yes

Which methods worked best for you? Send resume's, on-line applications,

Describe your typical interview I feel confident in interviews and I am able

Do you need help preparing for interviews? no

Job Keeping Skills

Were you able to get to work on time? Yes

Did you work most scheduled work hours? Yes

Describe your working relationship with your co-workers/supervisor

I am using those workers as personal references for other employment. In

What type of jobs have you liked in the past and what are you interested in?

Production supervisor and Maintenance manager, job with the government

Describe what you liked most about your last job

Working with people

Describe what you liked least about your last job

My hours would be rotating.

LMI vs. Potential Earnings: LMI

Print CAP Assessment Save Cancel

FRM-40505: ORACLE error: unable to perform query.

Record: 1/?

Figure 3: Assessment Module/Employment Tab

8. On the **Employment** tab, you can access the **Work History Alert** screen by clicking on the button.

Toolbox 2 (Test) - Assessment

File Edit Navigation Options Utility MO Utility Window Help

Assessment Date: 03/16/09 Last Update Date:

Education History

Highest grade completed? Currently in School: No

Would you like to obtain your high school diploma or GED?

Do you have a learning disability?

What did you like about school?

What did you dislike about school?

Are there any training programs you started but didn't complete?

Training Program	Reason for Leaving	Exit Date
------------------	--------------------	-----------

Are you interested in more training or skill enhancement?

Describe:

School: DON BOSCO CHARTERED SCHOOL

City: KANSAS CITY State: MO

Major:

Degree: Study Area Completion Date:

Employment Skills

Aptitude/Ability Tests

Test Type:

Test Date:

Results:

Education Issues

LEP/ESL:

Describe:

Pell grant status: Yr: Amt:

Describe:

Licenses and Certificates

Training Completion Certificates




Type	License/Certificate	Date	St
------	---------------------	------	----

Print CAP Assessment Save Cancel

Select from the LOV the highest grade the customer completed in school

Record: 1/1

Figure 4: Assessment Module/Education Tab

9. On the **Education** tab, you can access the **Teen Parent in an Educational Activity Alert** screen by clicking on the  button.
10. Once all relevant information is entered on the tabs within the **Assessment** module, click the  **Save** button.
11. Click on the  **Print CAP Assessment** button to print the CAP assessment form.
12. The client is required to sign the printed CAP assessment form.

Case Management Search

Viewing a list of active CAP clients by counselor.

1. Click on the Case Management Search icon to access the Case Management Search screen.

2. The General tab will display.

3. The field CM Status must display 'Active'.

4. The field Counselor must display your name. [If you prefer to search by different criteria such as Team, Office, Region, or County, you do not need to select a Counselor.]



5. The field to the right of Enrollment Type must display 'Actual'.

6. Click the Search button.

7. Additional fields on the General and Additional tabs can be completed to refine the search.

Figure 1: Case Management Search Module/Case Management Search Screen

Step-by-Step:



1. Click on the  Case Management Search icon to access the Case Management Search screen.
2. The **General** tab will display.
3. The field **CM Status** must display 'Active'.
4. The field **Counselor** must display your name. [If you prefer to search by different criteria such as **Team**, **Office**, **Region**, or **County**, you do not need to select a **Counselor**.]
5. The field to the right of **Enrollment Type** must display 'Actual'.
6. Click the  Search button.
7. Additional fields on the **General** and **Additional** tabs can be completed to refine the search.

Case Management Search

Viewing a list of either CAP recipient or CAP applicant records.

Figure 1: Case Management Search Module/Case Management Search Screen

Step-by-Step:

1. Click on the  **Case Management Search** icon to access the **Case Management Search** screen.
2. The **General** tab will display.
3. In the **CM Status** field, you have the option to view 'Active' or 'Inactive' records.
4. In the **Counselor** field, double click or press the F2 button to access a list of counselor names. Select the appropriate counselor.
5. In the **Enrollment Type** field, double click to access a list of programs. Select either 'CAP Applicant' or 'CAP Recipient'. If 'CAP Recipient' is selected, use the tab key to forward to the next field to make the **Category** screen pop-up. From the **Category** screen, you must select Mandatory, Sanctioned, or Voluntary.
6. In the field to the right of **Enrollment Type**, from the drop-down menu, select **Actual**, **Possible**, or **Both**.
 - **Actual** indicates that the client is 'enrolled' in the CAP program within the Employment Plan/Enrollment module in Toolbox 2.0.
 - **Possible** indicates that the client has been referred from FSD and is eligible to be 'enrolled' into the CAP program within the Employment Plan/Enrollment module in Toolbox 2.0.
 - **Both** encompasses both **Actual** and **Possible** clients.
7. Additional fields can be completed to refine the search. These additional fields include **Team**, **Office**, **Region**, **County**, **Service**, **Date**, **Veterans Only**, **No Notes last 30 days**, **No Tasks last 30 days**, **No Services** __ days, and **All History**.
8. Click the  **Search** button.

The screenshot shows the 'Toolbox 2 (Production) - Case Management Search' window. The 'Additional' tab is selected, indicated by callout 9. The form contains several input fields and checkboxes. Callout 10 points to the 'Age' field, and another callout 10 points to the 'Two Parent' checkbox. A third callout 10 points to the 'Teen Parent' checkbox. The form also includes fields for 'Provider', 'Enrollment', 'Zip', and 'City', along with checkboxes for 'Active with no plan', 'Enrolled with no plan', 'Lives outside office area', 'WIA Youth 5%', 'CAP participation hrs. under 30', 'Search for Pseudo SSN Only', and 'Search for Undoc. Alien Only'. A table with columns 'Name', 'Primary Counselor | Office | Team | Title', 'City', and 'Phone' is visible below the form. At the bottom, there are buttons for 'Select All', 'DeSelect All', 'Print Report', 'Print List', and 'Excel', along with a status bar showing 'Record: 1/1'.

Figure 2: Case Management Search Module/Case Management Search Screen

9. Click on the **Additional** tab to limit the search further.
10. Complete the fields of **Age**, **Two Parent**, **Teen Parent**, etc. as necessary. Two Parent and Teen Parent fields only apply to CAP.

Case Management Search

Sorting data within search results.

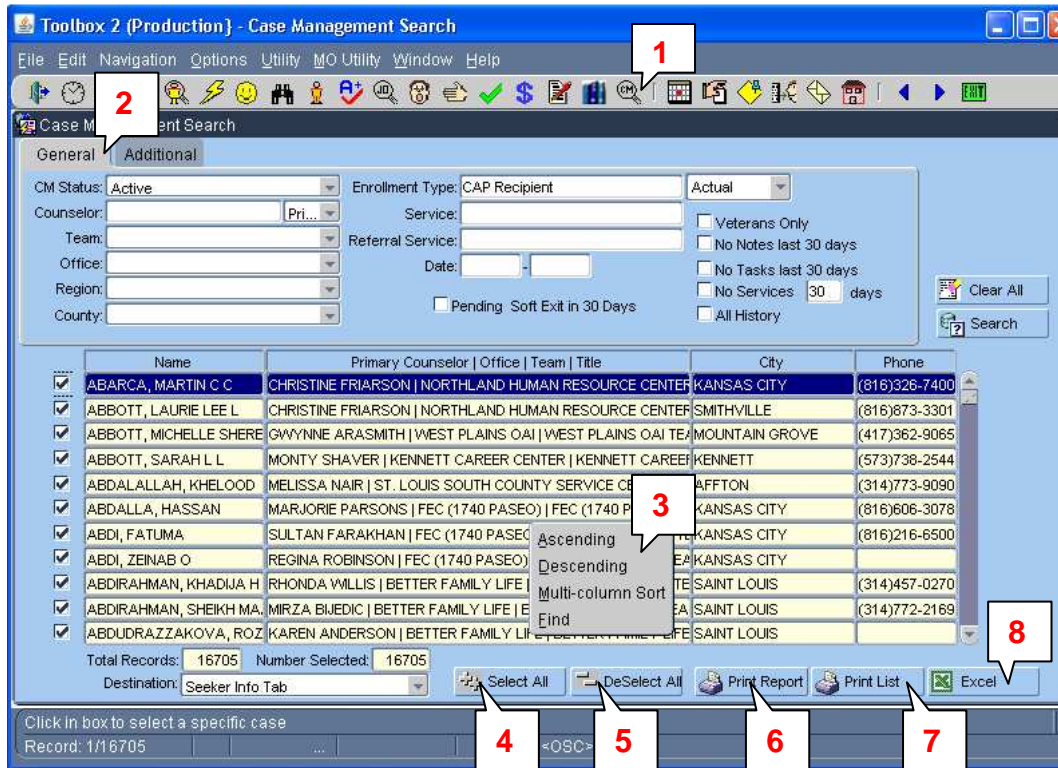


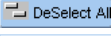
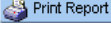
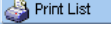
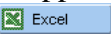


Figure 1: Case Management Search Module/Sorting Menu

Step-by-Step:

1. Click on the  **Case Management Search** icon to access the **Case Management Search** screen.
2. The **General** tab will display.
3. After completing the needed search, right click in the column **Primary Counselor | Office | Team | Title** to sort data by Ascending, Descending, Multi-Column Sort, or Find.
4. The  button allows you to select all records within the search.
5. The  button allows you to de-select all records within the search.
6. The  generates a Case Management Customer Report which includes the client's name, address, phone number, date of last case note, date of next appointment, date of next contact, date and type of service(s) client is enrolled in, any possible and actual enrollment the client that corresponds to the client, etc.
7. The  generates a Case Management Customer List which contains the client's SSN, name, App ID, DCN ID, Counselor Name, City, and Phone number.
8. The  button allows you to import the case manager search data into an Excel spreadsheet which include the fields Name, Counselor/Location, City and Phone.

Case Management Search

Reassigning a primary counselor from the Case Management Search screen.

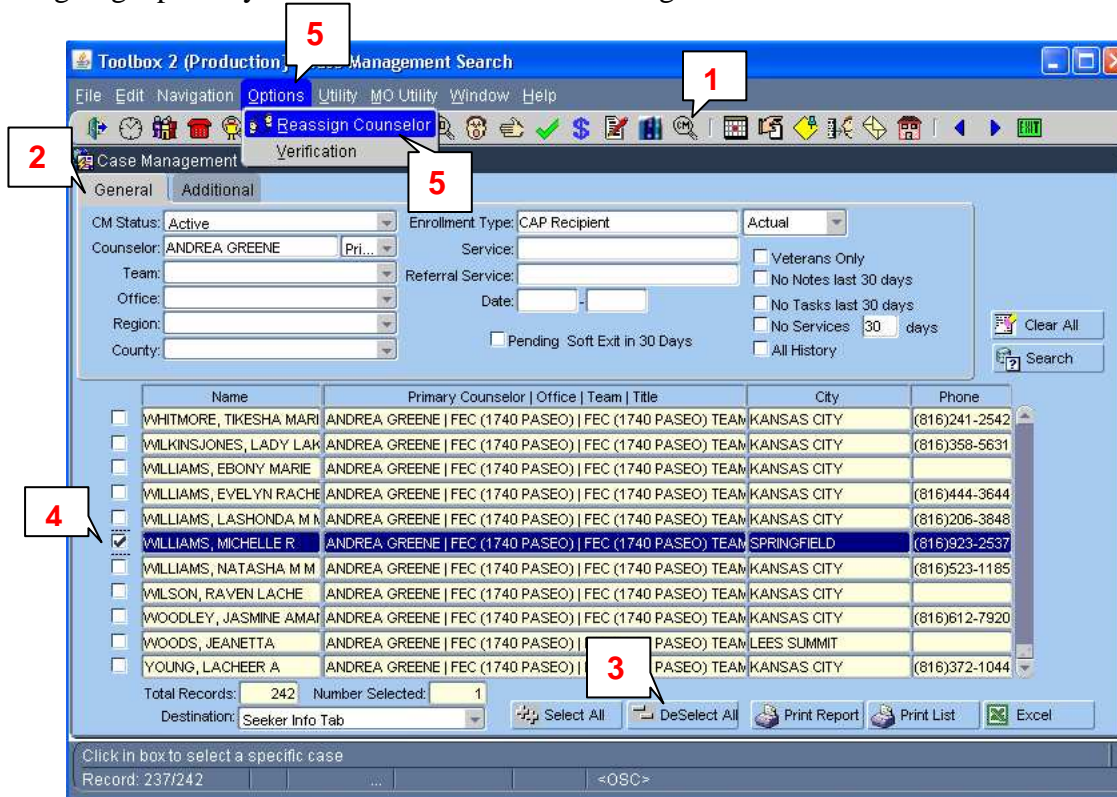


Figure 1: Case Management Search Module/Options Menu/Reassigning Counselor Option

Step-by-Step:

1. Click on the Case Management Search icon to access the Case Management Search screen.
2. Access the **General** tab. [NOTE: You must be logged into the same location as the record you are transferring.]
3. Click the button to deselect all records. If you are transferring an entire caseload, skip this step.
4. For the record(s) you wish to reassign a primary counselor, check the field(s) to the left of the client's name.
5. From the **Options** menu, select **Reassign Counselor**. A pop-up to select a counselor will appear.

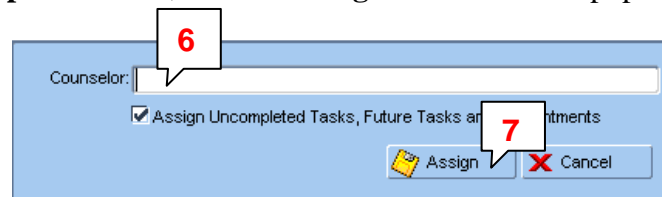


Figure 2: Counselor Screen

6. Double-click or press the F2 key in the **Counselor** field to access a list of counselors.
7. Once a counselor is selected, click on the button.

Case Management Transfer Clerk

Only one staff person per location can be assigned as the ‘**Case Management Transfer Clerk**’. However, a staff person can be listed as the ‘**Case Management Transfer Clerk**’ for more than one location.

The ‘**Case Management Transfer Clerk**’ has the responsibility to send case transfer requests to the appropriate ‘Case Transfer Clerk’; descriptions provided below. [The ‘Case Transfer Clerk’ will receive all transfer tasks, regardless of what program the customer is tied to.] The ‘Case Management Transfer Clerk’ may also serve as any or all of the ‘Case Transfer Clerks’. Also, multiple staff may serve as the different types of ‘Case Transfer Clerks’.

Different Types of Case Transfer Clerks:

- ***Case Transfer:*** has the ability to transfer a case from one office to another office.
- ***Case Transfer Mailbox:*** has the ability to assign a case received from another office to a counselor within the receiving office.
- ***Reassign Counselor:*** has the ability to assign a case from one counselor to another counselor within the same office location.
- ***Reassign Appointments/Tasks:*** has the ability to transfer appointments and tasks to another counselor within the same office location. (This is necessary when a counselor is out of the office for an extended period of time due to vacation, illness, etc.)

Case Transfer

Transferring a case to another office.

Find Seeker | **Seeker Info** | Des Job Title | Edu/Cert | Work History | Referrals | Other | Scratch Pad | Svc Referral | Adv. Query

Name and Address Information:
Name: LASHANDRA TAYLOR
Mailing Address: 1530 S TUSCANY CT
Street Address: [Blank]
Phone Numbers: Home: [Blank], Cell: (228)990-8544, Work: [Blank], Other: [Blank]
City: OZARK, State: MC, Zip: 65721-8494
Email: LITTLEINDIANGR@AOL.COM

Personal Information:
Date of Birth: 09/10/1979
Age: 30
Gender: F
Citizen: Y
Status: ☒ In School, ☐ Disabled, ☐ Searchable, ☐ Individual, ☒ Share resume, ☐ Rapid Response, ☐ Migrant Worker, ☐ Deceased
Veteran Information: Vet Status: N - None, Transition: [Blank]
Branch: [Blank]

Seeker Status:
Status: Active, Date: 09/10/09, Last Update: 09/23/09
Case Management: Active, Next Appt: [Blank], Time: [Blank]
UI Ben Year Beg Dt: Inactive, Next Task: [Blank]
Job Contacts: [Blank]
App ID: 3122782667, CAP Recipient/Mandatory: [Blank]
DCN: 0063496609

Services Provided:
Date | Type of Service | Employment Counselor
09/10/09 | Assessment | MICHAEL STEWART
09/10/09 | Initial Interview | MICHAEL STEWART

Buttons: Web Info, Save, Cancel

Figure 1: Find Seeker Module/Seeker Info Tab

Step-by-Step:

1. Click on the **Find Seeker** icon to access a client's record.
2. Click on the **Seeker Info** tab.


Options | Create Appointment (Alt+A) | Create Task (Alt+T) | Notes (Alt+N) | Create Referral (Alt+R) | Create Scratch Pad (Alt+P) | Correspondence (Alt+C) | Service Referral (Alt+L) | Send Info Card | Counselor Information | Seeker Services | Seeker Alerts | Seeker Placement | File Location | MO Program Specific | Activate/Inactivate Seeker | Reset Emp Exchange | Activate/Inactivate Case Mgmt | **Case Transfer** | Case Transfer Inbox/Outbox | Red Flag | Form Manager | Print Training Services | Print Transcript | Print Resume | Print Scanable Resume

Figure 2: Options Menu/Case Transfer Option

3. Click on **Options** **Options** menu.
4. Select **Case Transfer**. A Case Transfer screen will pop-up.

The screenshot shows a 'Case Transfer' window with a light blue background. At the top, there's a title bar with a small icon and the text 'Case Transfer'. Below the title bar, there are two input fields: 'SSN:' and 'EC:'. The 'SSN' field contains the text 'TAYLOR, LASHANDRA'. A red callout box with the number '5' points to the 'EC' field. Below these fields is a 'Checklist' section with four checkboxes: 'Emp Plan Update', 'Note Summary', 'Funding Update', and 'Updated Address (if available)'. A red callout box with the number '6' points to the 'Checklist' section. Below the checklist is a 'Transfer Comments:' section with a large text area. A red callout box with the number '7' points to this text area. At the bottom right of the window are two buttons: 'Transfer' (with a yellow folder icon) and 'Cancel' (with a red 'X' icon). A red callout box with the number '8' points to the 'Transfer' button.

Figure 3: Case Transfer Screen

5. Double-click or press the F2 button while in the **EC** field for a list of possible locations.
6. With a location selected, check the applicable fields listed under **Checklist**.
7. Add any necessary comments in the **Transfer Comments** field.
8. Click the  **Transfer** button to transfer the client's record.

Retrieving Case Transfer

Retrieving a case that was transferred to another office.

Toolbox 2 (Test) - Seeker

File Edit Navigation Options Utility Window Help

Seeker Screen - MICHAEL STEWART *TRANSFERRED*

Find Seeker Seeker Info Des Job Title Edu/Cert Work History Referrals Other Scratch Pad Svc Referral Adv. Query

Name and Address Information
Name: LASHANDRA TAYLOR
Mailing Address: 1530 S TUSCANY CT
Street Address:
Phone Numbers
Home: Cell: (228)990-8544
Work: OZARK MC 65721-8494
Email: LITTLEINDIANGR@AOL.COM

Personal Information
Date of Birth: 09/10/1979
Age: 30
Gender: F
Citizen: Y
Allien Reg # A
Vet Status: N - None
Transition:
Served From Served To
Branch:
Source: Default Counselor
Status: Verified
Partial Seeker
Secondary Counselor

Seeker Status
Status: Active
Date: 09/10/09
Last Update: 11/18/09
Case Management: Active
Next Appt: Time:
UI Ben Year Beg Dt: Inactive
Next Task: 11/18/09
Job Contacts:
App ID: 3122782667
DCN: 0063496609
Actual Enrollments
CAP Recipient/Mandatory
Possible Enrollments

Services Provided

Date	Type of Service	Employment Counselor
11/18/09	Assessment	MYRA HUHMANN
09/10/09	Initial Interview	MICHAEL STEWART
09/10/09	Assessment	MICHAEL STEWART

Web Info Save Cancel

Seeker's first name
Record: 1/1

Figure 1: Find Seeker Module/Seeker Info Tab

Step-by-Step:

1. If the location of the client's record is unknown, use the **Find Seeker** icon to access the client's record.
2. The Primary Counselor is identified on the top right of the record.

Toolbox 2 (Test) - Case Management Search

File Edit Navigation Options Utility MO Utility Window Help

Case Management Search

General Additional



CM Status: Active
Enrollment Type: Actual
Counselor: MICHAEL STEWART
Service:
Team:
Referral Service:
Office:
Date:
Region:
County:
Pending Soft Exit in 30 Days
Veterans Only
No Notes last 30 days
No Tasks last 30 days
No Services last 30 days
All History
Clear All
Search

Name	Primary Counselor	Office	Team	Title	City	Phone
SMITH, KRYSTAL ANN	MICHAEL STEWART	SPRINGFIELD CAREER CENTER	SPRINGFIELD	OZARK	(417)224-2549	
SNEED, CECILIA T D	MICHAEL STEWART	SPRINGFIELD CAREER CENTER	SPRINGFIELD	FAIR GROVE	(417)880-4131	
SOUTHARD, SARAH	MICHAEL STEWART	SPRINGFIELD CAREER CENTER	SPRINGFIELD	SPRINGFIELD	(417)886-6627	
STOCKTON, CASEY DIANE	MICHAEL STEWART	SPRINGFIELD CAREER CENTER	SPRINGFIELD	OZARK		
SULLIVAN, SARA CH	MICHAEL STEWART	SPRINGFIELD CAREER CENTER	SPRINGFIELD	SPRINGFIELD	(417)522-6030	
SUTTON, NETASHA E	MICHAEL STEWART	SPRINGFIELD CAREER CENTER	SPRINGFIELD	SPRINGFIELD	(620)719-7406	
TARTER, TINA LYNN	MICHAEL STEWART	SPRINGFIELD CAREER CENTER	SPRINGFIELD	BILLINGS	(417)353-9912	
TAYLOR, LASHANDRA	MICHAEL STEWART	SPRINGFIELD CAREER CENTER	SPRINGFIELD	OZARK		
TAYLOR, SARRAH M M	MICHAEL STEWART	SPRINGFIELD CAREER CENTER	SPRINGFIELD	SPRINGFIELD	(417)831-1388	
TAYLOR, VICKIE A	MICHAEL STEWART	SPRINGFIELD CAREER CENTER	SPRINGFIELD	SPRINGFIELD	(417)823-9330	
TAYLOR, VIVIAN JOY	MICHAEL STEWART	SPRINGFIELD CAREER CENTER	SPRINGFIELD	SPRINGFIELD	(417)689-9974	

Total Records: 217 Number Selected: 217
Destination: Seeker Info Tab
Select All DeSelect All Print Report Print List Excel

Click in box to select a specific case
Record: 183/217

Figure 2: Case Management Search Module/General Tab

3. Click the  **Case Management Search** icon to access the **Case Management Search** screen.
4. The **General** tab will display.
5. Enter the Primary Counselor's name into the **Counselor** field. [Complete any other applicable fields.]
6. Click the  **Search** button to access the Primary Counselor's caseload.
7. From the returned search, find the client's record.
8. Use the field **Primary Counselor | Office | Team | Title** to determine the location of the client's record.
9. Close the client's record and access the **Splash** screen.

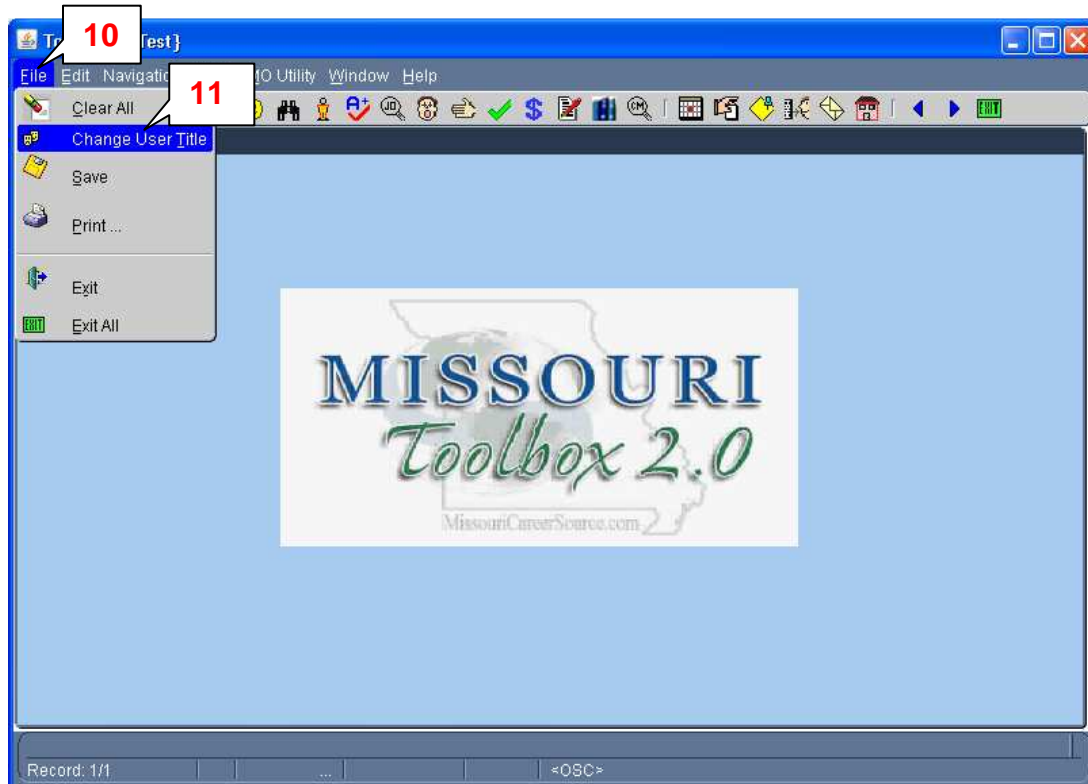


Figure 3: Splash Screen/File Menu/Change User Title Option

10. Click on the **File** menu.
11. Select **Change User Title**. A Change Agent Hat screen will pop-up.

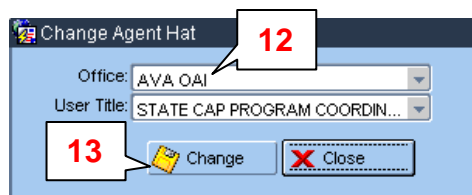



Figure : Change Agent Hat Screen

12. Change the **Office** field to match the Primary Counselor's location.
13. Click the  **Change** button to change the office location.

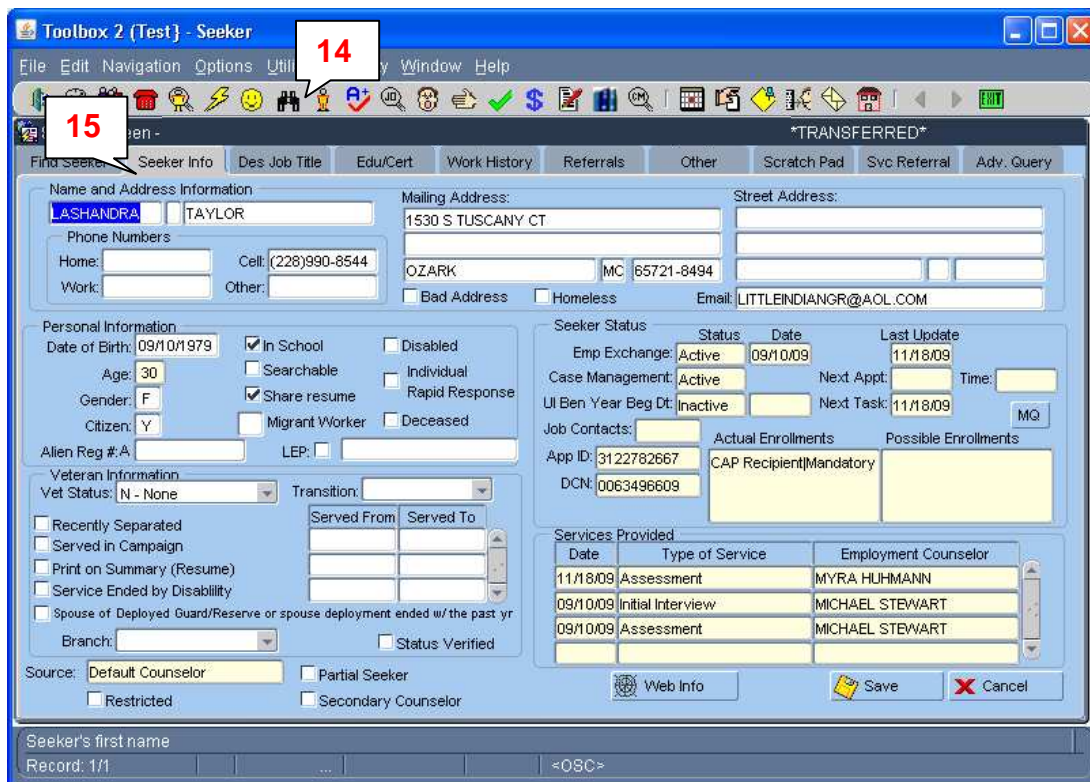


Figure 4: Find Seeker Module/Seeker Info Tab

14. Click the **Find Seeker** icon to access the client's record.
15. Access the **Seeker Info** tab.

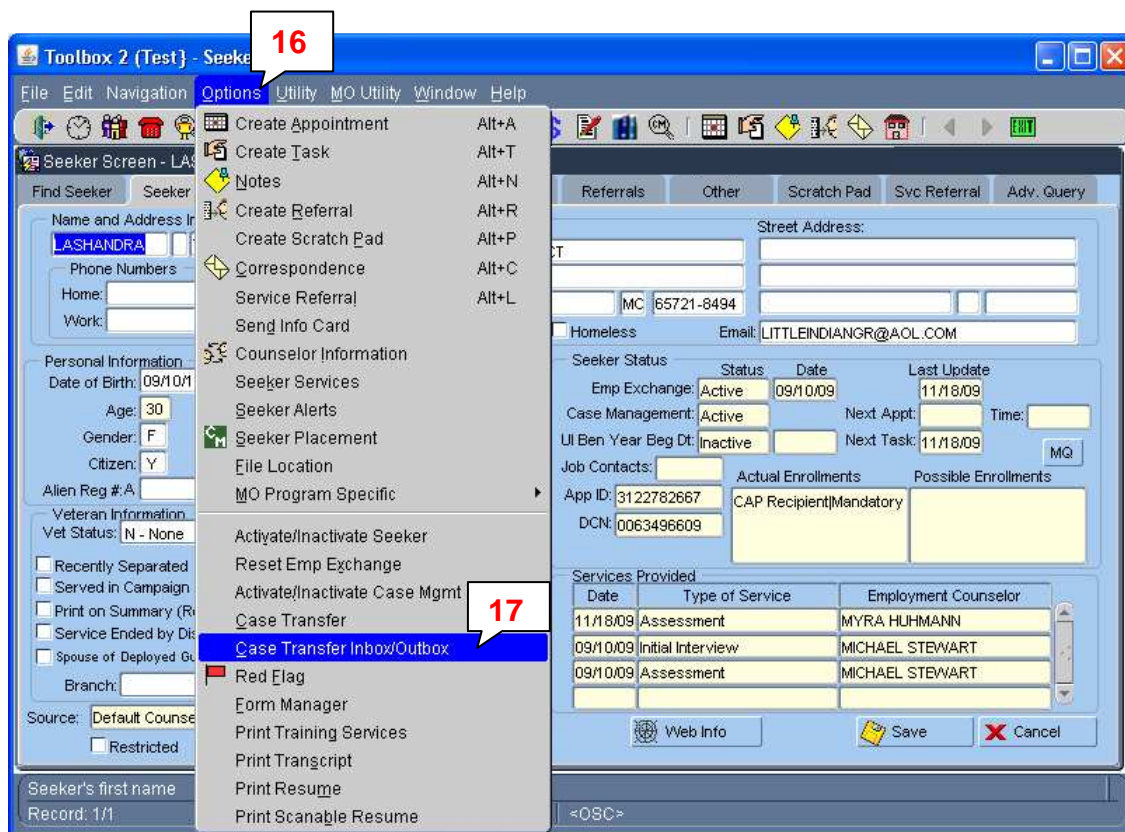


Figure 5: Options Menu/Case Transfer Inbox-Outbox Option

16. Click on the **Options** menu

17. Select **Case Transfer Inbox/Outbox**. The Case Transfer Inbox/Outbox screen will appear.

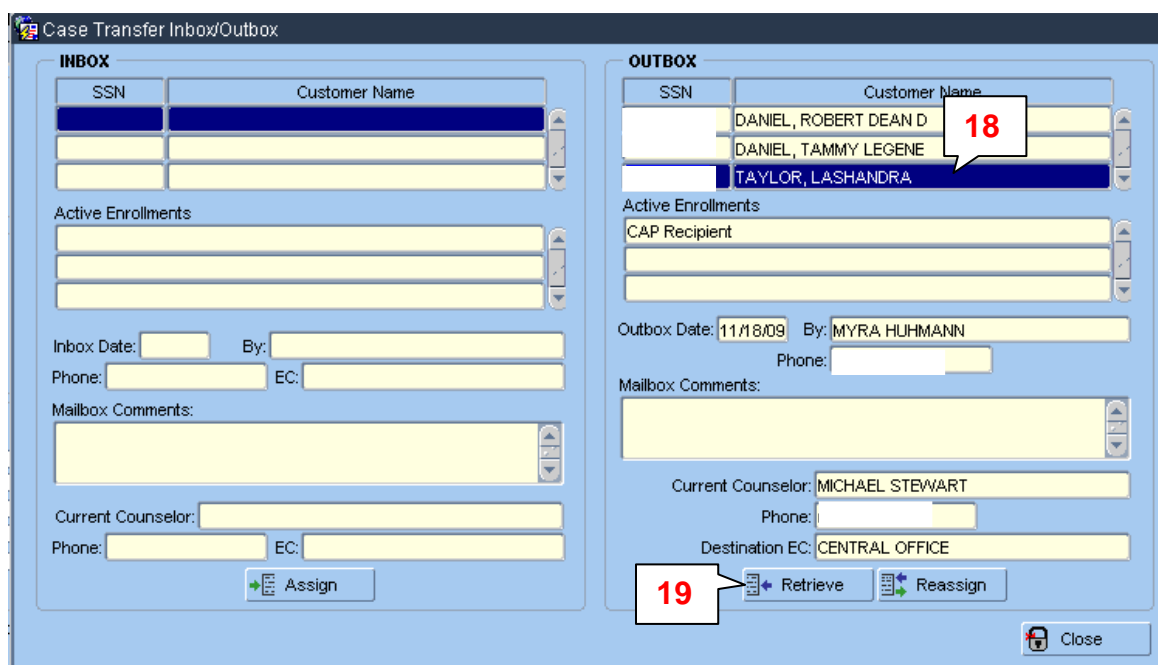

The screenshot shows the 'Case Transfer Inbox/Outbox' window. It is divided into two main sections: 'INBOX' on the left and 'OUTBOX' on the right. Both sections have a table with columns for 'SSN' and 'Customer Name'. In the 'OUTBOX' table, the third row, 'TAYLOR, LASHANDRA', is highlighted in blue and labeled with a red '18'. Below the tables are various input fields: 'Active Enrollments', 'CAP Recipient', 'Inbox Date', 'By', 'Phone', 'EC', 'Mailbox Comments', 'Current Counselor', and 'Destination EC'. At the bottom of the 'OUTBOX' section, there are three buttons: 'Retrieve' (labeled with a red '19'), 'Reassign', and 'Close'. The 'Retrieve' button has a magnifying glass icon.

Figure 6: Case Transfer Inbox/Outbox Screen

18. In the **Outbox** section, highlight the client you wish to retrieve.

19. Click the  button to retrieve the client's record. A Retrieve Case screen will pop-up.

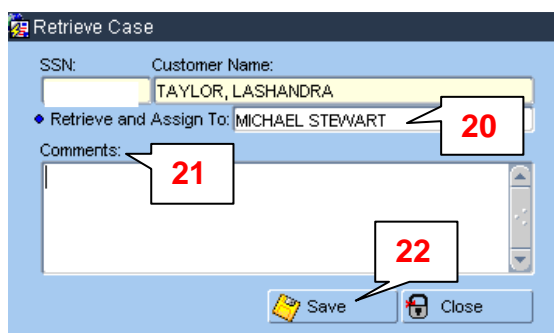

The screenshot shows the 'Retrieve Case' window. It contains fields for 'SSN', 'Customer Name' (filled with 'TAYLOR, LASHANDRA'), and 'Retrieve and Assign To' (filled with 'MICHAEL STEWART' and labeled with a red '20'). There is a 'Comments' field (labeled with a red '21') and a 'Save' button (labeled with a red '22'). At the bottom right is a 'Close' button. The 'Save' button has a floppy disk icon.

Figure 7: Retrieve Case Screen

20. In the **Retrieve and Assign To** field will allow you to assign a Primary Counselor. Double-click for a list of counselors.

21. After a counselor is selected, add any necessary information into the **Comments** field.

22. Click the  button. You will receive a confirmation message.



The screenshot shows a 'Forms' message dialog box. It has a title bar with 'Forms' and a close button. The main area contains a red bell icon and the text 'Case retrieved successfully.'. At the bottom right is an 'OK' button (labeled with a red '23').

Figure 8: Forms Message

23. Click the  button. The client will be removed from the **Outbox** field and placed in the **Inbox** field.

Reassigning a Case Transfer



Reassigning a case that was transferred to another office.

Figure 1: Find Seeker Module/Seeker Info Tab

Step-by-Step:

1. If the location of the client's record is unknown, use the **Find Seeker** icon to access the client's record.
2. The Primary Counselor is identified on the top right of the record.

Figure 2: Case Management Search Module/General Tab

3. Click the  **Case Management Search** icon to access the **Case Management Search** screen.
4. The **General** tab will display.
5. Enter the Primary Counselor's name into the **Counselor** field. [Complete any other applicable fields.]
6. Click the  **Search** button to access the Primary Counselor's caseload.
7. From the returned search, find the client's record.
8. Use the field **Primary Counselor | Office | Team | Title** to determine the location of the client's record.
9. Close the client's record and access the **Splash** screen.

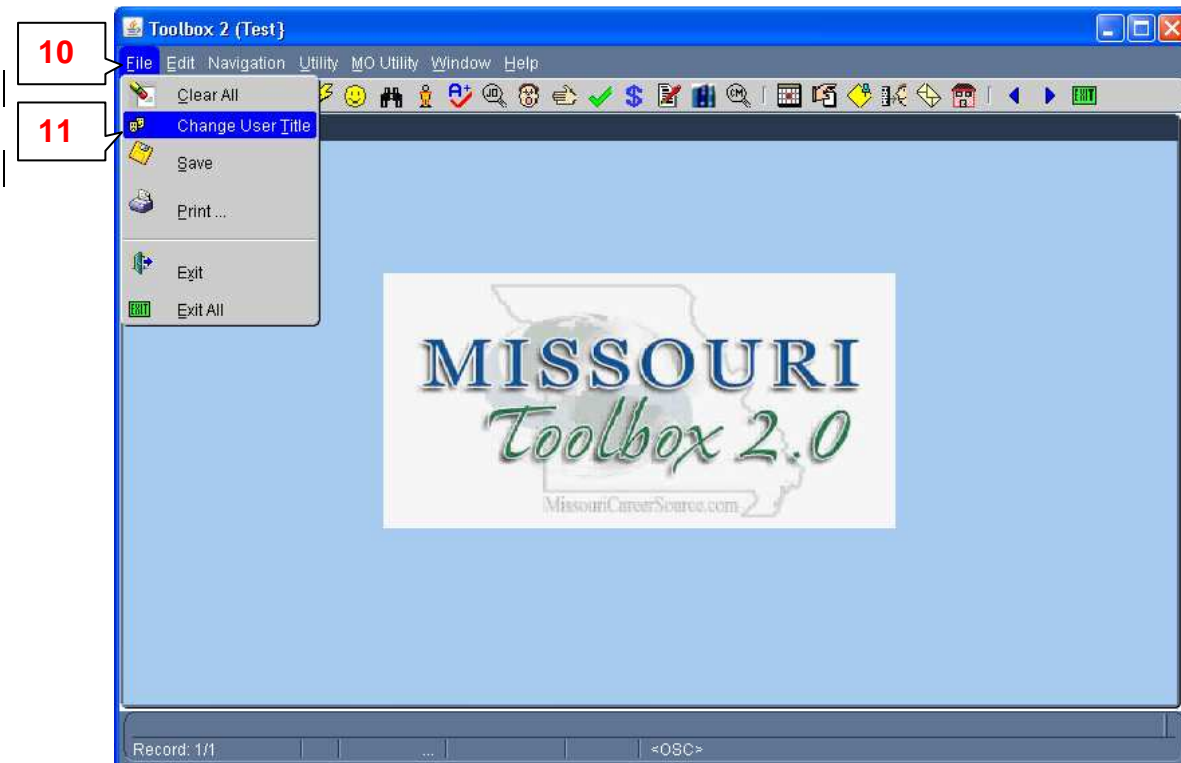


Figure 3: Splash Screen/File Menu/Change User Title Option

10. Click on the **File** menu
11. Select **Change User Title**. A Change Agent Hat screen will pop-up.

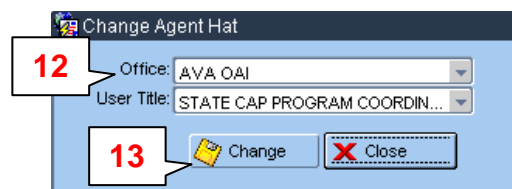



Figure 4: Change Agent Hat Screen

12. Change the **Office** field to match the Primary Counselor's location.
13. Click the  **Change** button to change the office location.

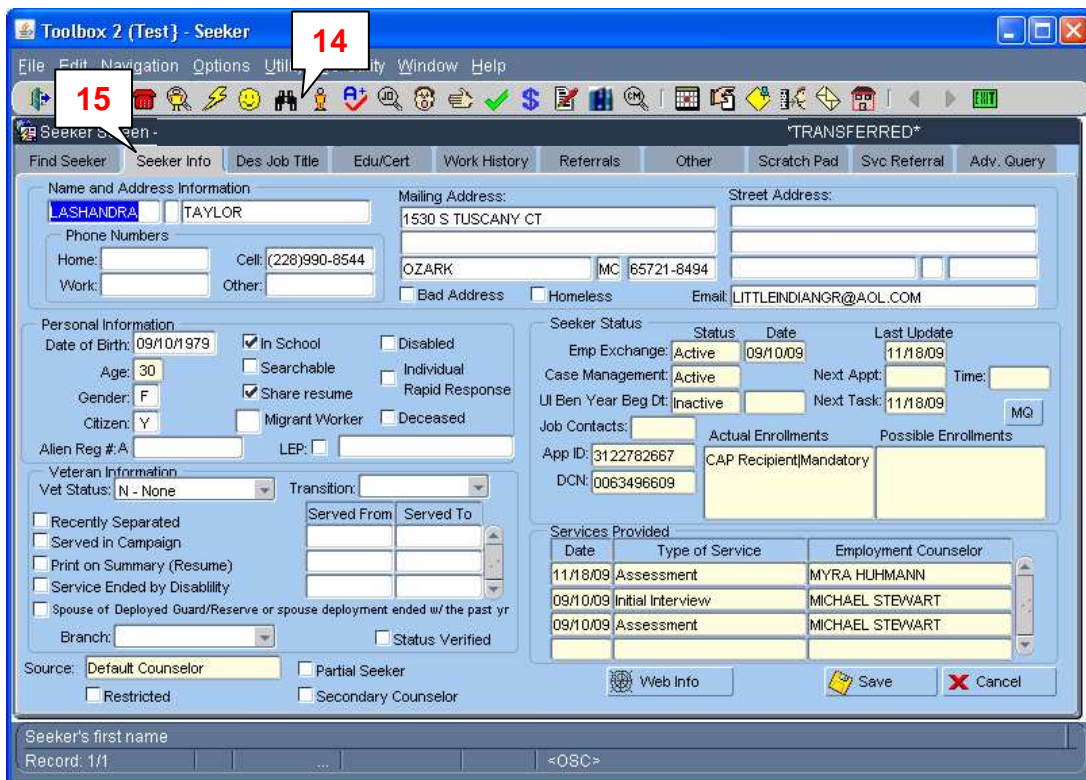



Figure 5: Find Seeker Module/Seeker Info Tab

14. Click the  **Find Seeker** icon to access the client's record.
15. Access the **Seeker Info** tab.

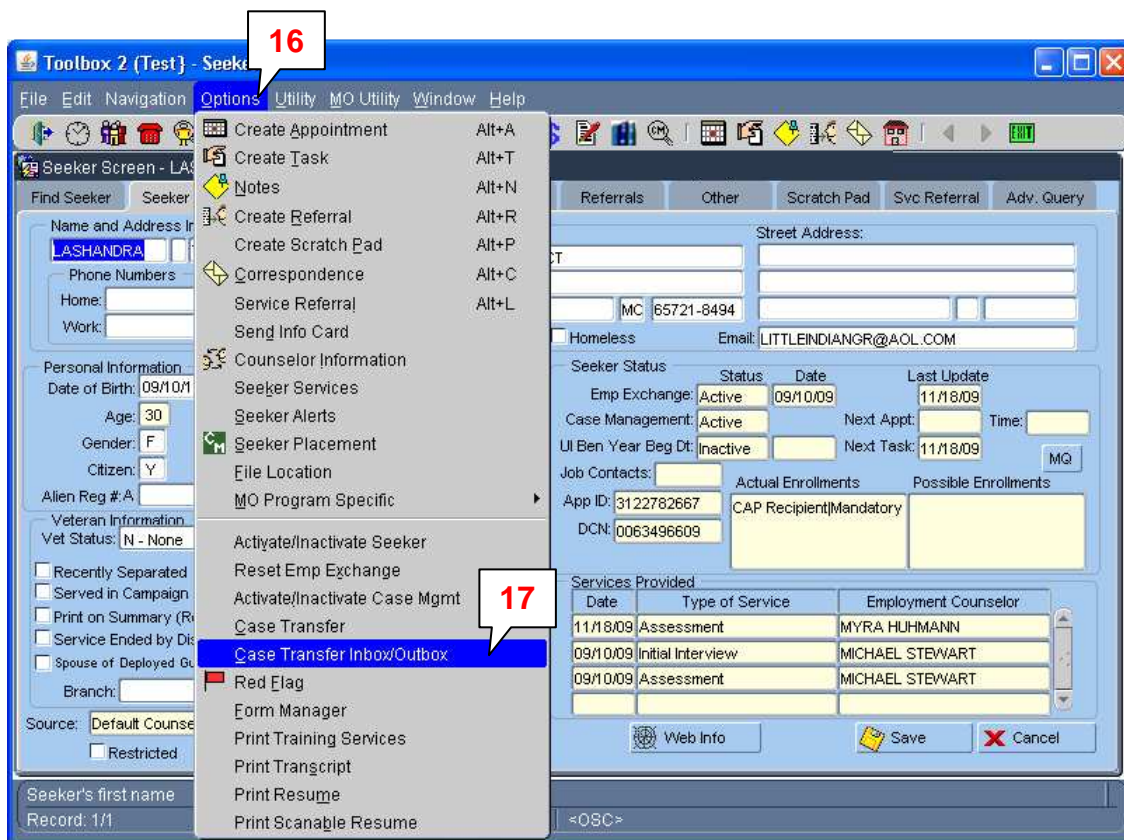
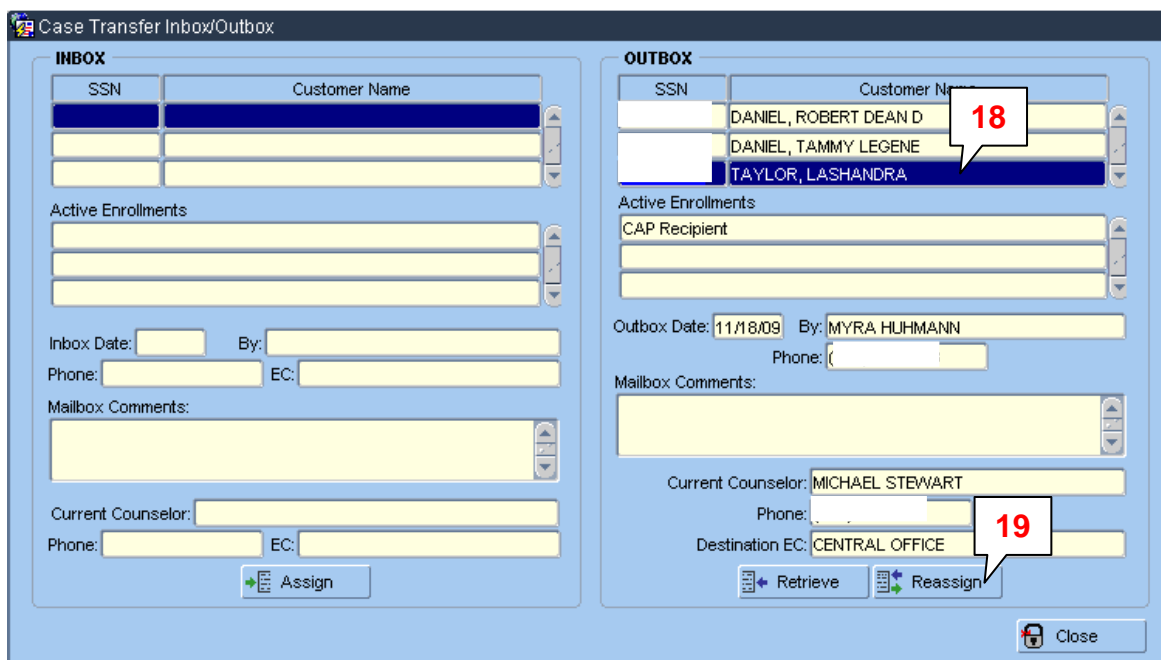


Figure 6: Options Menu/Case Transfer Inbox-Outbox Option

16. Click on the **Options** menu

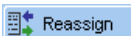
17. Select **Case Transfer Inbox/Outbox**. The Case Transfer Inbox/Outbox screen will appear.

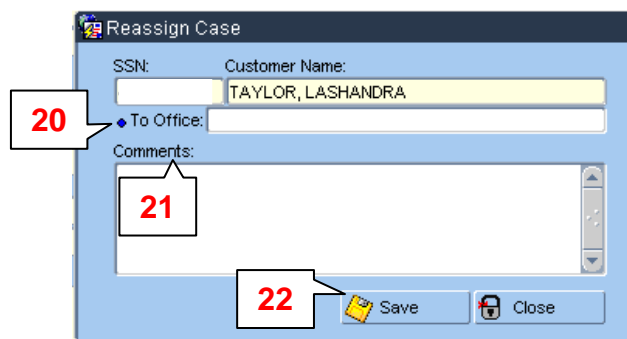


The screenshot shows the 'Case Transfer Inbox/Outbox' window. It is divided into two main sections: 'INBOX' on the left and 'OUTBOX' on the right. Both sections have a table with columns for 'SSN' and 'Customer Name'. In the 'OUTBOX' table, the third row is highlighted in blue, showing 'TAYLOR, LASHANDRA', with a red callout bubble labeled '18' pointing to it. Below the tables are fields for 'Active Enrollments', 'CAP Recipient', 'Inbox Date', 'By', 'Phone', 'EC', 'Mailbox Comments', 'Current Counselor', and 'Destination EC'. In the 'OUTBOX' section, the 'Outbox Date' is '11/18/09', 'By' is 'MYRA HUHMANN', 'Current Counselor' is 'MICHAEL STEWART', and 'Destination EC' is 'CENTRAL OFFICE'. A red callout bubble labeled '19' points to the 'Reassign' button at the bottom right. Other buttons include 'Assign', 'Retrieve', and 'Close'.

Figure 7: Case Transfer Inbox/Outbox Screen

18. In the **Outbox** section, highlight the client you wish to retrieve.

19. Click the  **Reassign** button to reassign the client's record. A Reassign Case screen will pop-up.



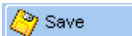
The screenshot shows the 'Reassign Case' window. It contains fields for 'SSN', 'Customer Name' (filled with 'TAYLOR, LASHANDRA'), 'To Office', and 'Comments'. A red callout bubble labeled '20' points to the 'To Office' field. Another red callout bubble labeled '21' points to the 'Comments' text area. At the bottom, there are 'Save' and 'Close' buttons. A red callout bubble labeled '22' points to the 'Save' button.

Figure 8: Reassign Case Screen

20. The **To Office** field will allow you to select a different location to transfer the case to.

Double-click for a list of locations.

21. After a location is selected, add any necessary information into the **Comments** field.

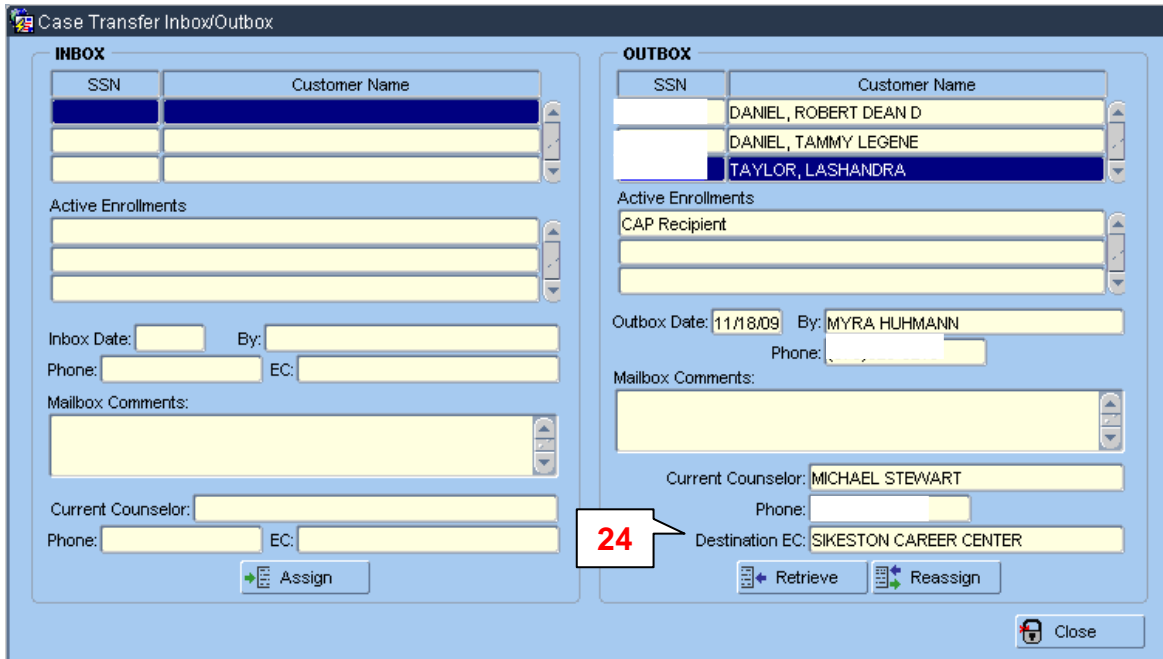
22. Click the  **Save** button. You will receive a confirmation message.



The screenshot shows a 'Forms' message dialog box. It has a red speech bubble icon on the left and the text 'Case reassigned to SIKESTON CAREER CENTER' in the center. At the bottom right, there is an 'OK' button. A red callout bubble labeled '23' points to the 'OK' button.

Figure 9: Forms Message

23. Click the  button.



The screenshot shows a software window titled "Case Transfer Inbox/Outbox". It is divided into two main sections: "INBOX" on the left and "OUTBOX" on the right. Both sections have a table with "SSN" and "Customer Name" columns. The "OUTBOX" table contains three entries: "DANIEL, ROBERT DEAN D", "DANIEL, TAMMY LEGENE", and "TAYLOR, LASHANDRA", with the last one selected. Below the tables are fields for "Active Enrollments", "Inbox Date", "By", "Phone", "EC", "Mailbox Comments", "Current Counselor", and "Phone". The "OUTBOX" section also includes "Outbox Date" (11/18/09), "By" (MYRA HUHMANN), "Phone", "Mailbox Comments", "Current Counselor" (MICHAEL STEWART), "Phone", and "Destination EC" (SIKESTON CAREER CENTER). A red callout box with the number "24" points to the "Destination EC" field. At the bottom of each section are buttons: "Assign" in the inbox and "Retrieve" and "Reassign" in the outbox. A "Close" button is at the bottom right.

SSN	Customer Name
	DANIEL, ROBERT DEAN D
	DANIEL, TAMMY LEGENE
	TAYLOR, LASHANDRA

Active Enrollments

Inbox Date: By: Phone: EC: Mailbox Comments: Current Counselor: Phone: EC: Assign

OUTBOX

SSN	Customer Name
	DANIEL, ROBERT DEAN D
	DANIEL, TAMMY LEGENE
	TAYLOR, LASHANDRA

Active Enrollments

Outbox Date: 11/18/09 By: MYRA HUHMANN Phone: Mailbox Comments: Current Counselor: MICHAEL STEWART Phone: Destination EC: SIKESTON CAREER CENTER Retrieve Reassign

24

Close

Figure 10: Case Transfer Inbox/Outbox Screen

24. The **Destination EC** field will reflect the new location the case has been transferred to.

Reassigning a Task

Reassigning a task to another counselor.

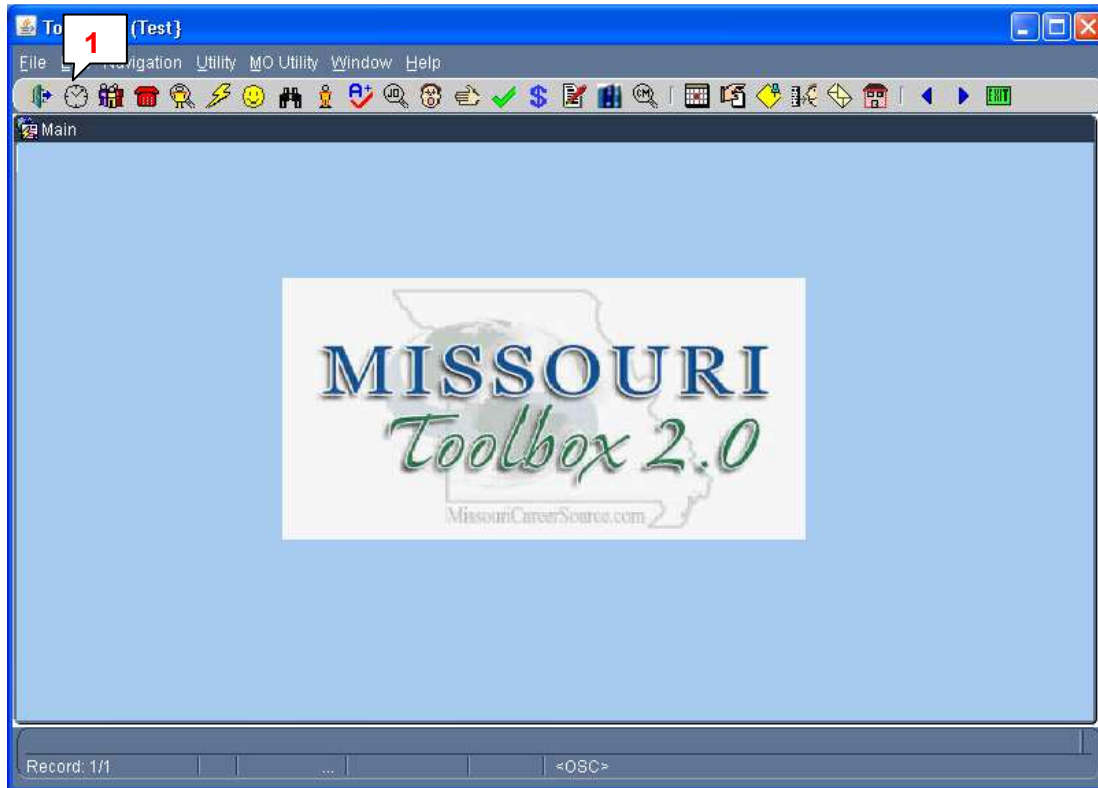


Figure 1: Daily Schedule Module

Step-by-Step:

1. Click on the  **Daily Schedule** icon.

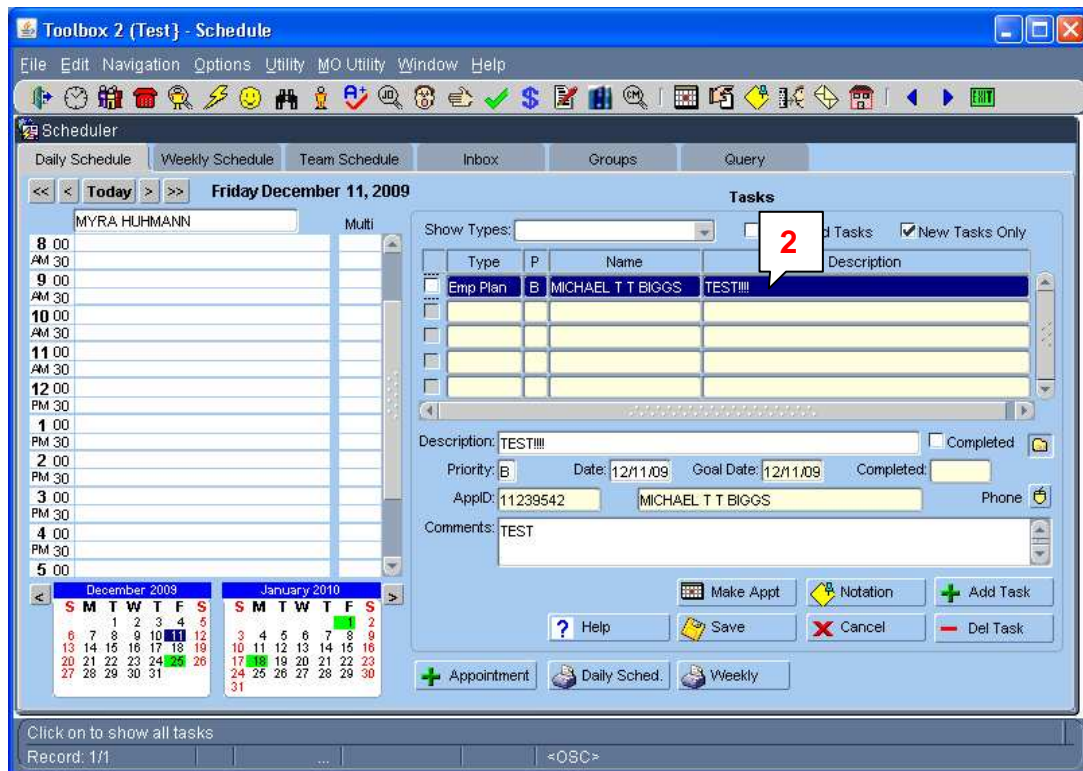


Figure 2: Scheduler Screen

2. Double click on the task you want to transfer.

Figure 3: Tasks Screen



3. Click the  icon to open the client's record.

Figure 4: Find Seeker Module/Seeker Info Tab

4. On the **Seeker Info** tab, review the **Actual** and **Possible Enrollments** to determine the appropriate staff person for assignment.
5. Click the  button to close the client's record and return to the **Daily Schedule**.

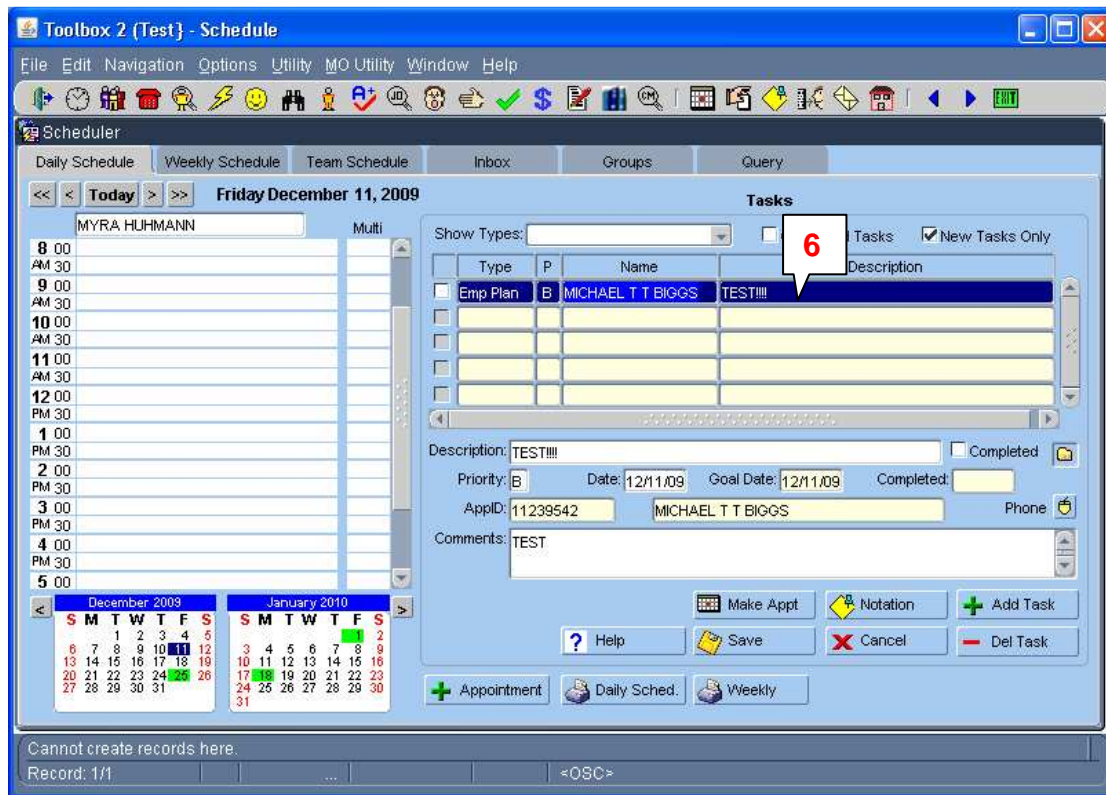


Figure 5: Scheduler Screen

6. Double click on the task you want to transfer.

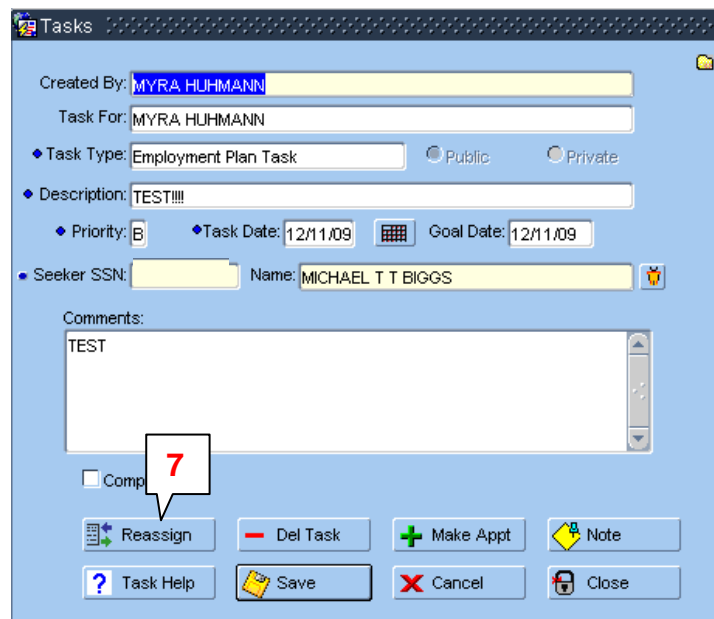


Figure 6: Tasks Screen

7. Click the  Reassign button.

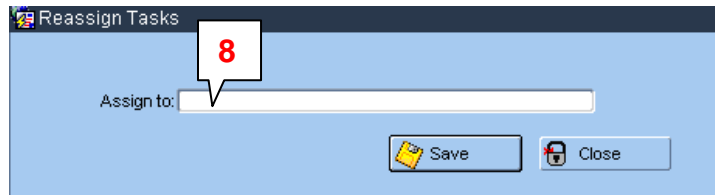


Figure 7: Reassign Tasks Screen

8. Double click in the **Assign to:** field for a list of counselors.

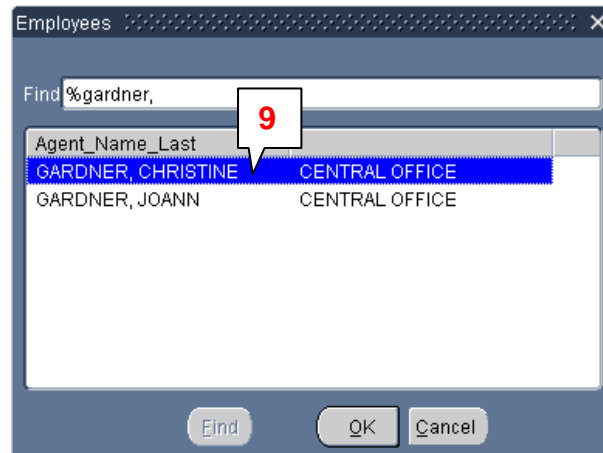


Figure 7: Employees Screen

9. Select the counselor you wish to reassign the task to.

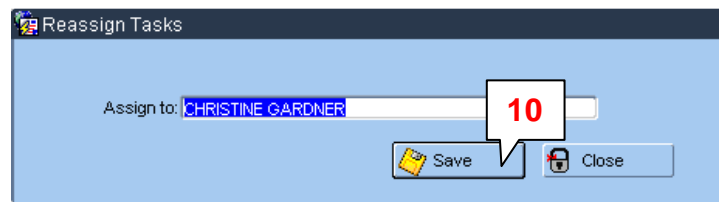



Figure 9: Reassign Tasks Screen

10. Click the  **Save** button to reassign task, close screen, and return to the **Scheduler**.

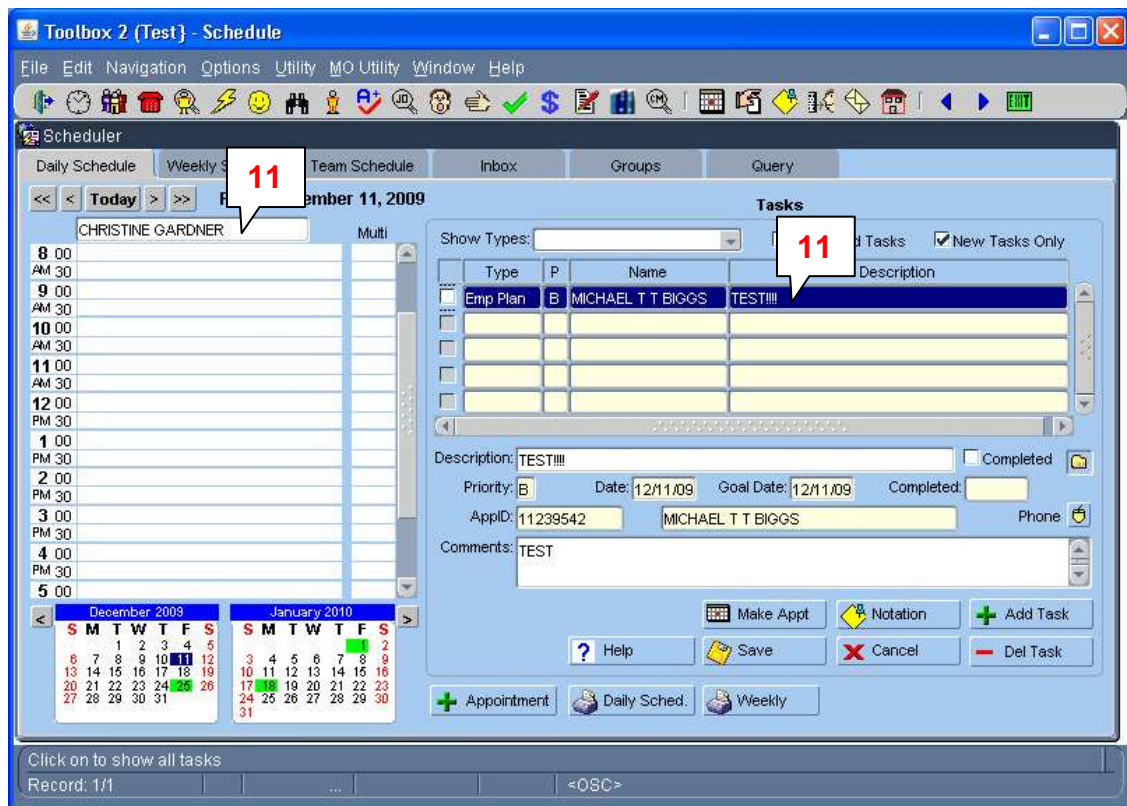


Figure 10: Scheduler Screen

11. You can review the designated counselor's schedule to verify that task was reassigned.

Case Notes

Entering/adding a case note.

The screenshot shows the 'Toolbox 2 (Production) - Seeker' application. The 'Notes' icon in the toolbar is highlighted with a red callout box containing the number '1'. The main form is titled 'Seeker Screen -' and contains several sections: 'Name and Address Information', 'Personal Information', 'Veteran Information', 'Seeker Status', and 'Services Provided'. The 'Services Provided' section includes a table with columns for Date, Type of Service, and Employment Counselor.

Date	Type of Service	Employment Counselor
09/10/09	Assessment	MICHAEL STEWART
09/10/09	Initial Interview	MICHAEL STEWART

Figure 1: Notes Module

Step-by-Step:

1. With a client's record open, click on the  **Notes** icon and the **Notes for Seeker** screen will pop-up.

The screenshot shows the 'Notes for Seeker' application. A red callout box with the number '2' points to the '+ Add' button. The window displays a table of notes with columns for Date, Note Category, Subject, Counselor, and Follow-Up Date. Below the table is a text area for entering a note.

Date	Note Category	Subject	Counselor	Follow-Up Dt
02/24/09	Case Review	Re-entry to job search wk 1	GARY MORRISON	03/04/09
02/23/09	Employment Plk	JS non-activity	GARY MORRISON	02/26/09
02/19/09	Progress Eval	Start of conciliation activity -- no JS logs rcvd	GARY MORRISON	06/19/09
02/06/09	Employment Plk	JS Logs not received	GARY MORRISON	02/13/09
01/20/09	Customer Cont	1st X applic FU	GARY MORRISON	02/06/09
01/20/09	Employment Plk	Recipient followup interview	GARY MORRISON	01/27/09
01/20/09	Employment Plk	job search status	GARY MORRISON	01/27/09
01/15/09	Progress Eval	Recip FollowUp appt	GARY MORRISON	01/20/09
01/13/09	Customer Cont	1st X Recip FU Appt Change	GARY MORRISON	01/14/09
01/05/09	Customer Cont	1st followUp	GARY MORRISON	01/14/09

Lamont called this Am--he has spent last 30 days in Kentucky, & has not accessed his mail until today. per disc w/ sprvrs, he is back in JS, wk 1, and 2 wks logs are issued. he must turn in logs wkly, and will be placed in conciliation simultaneously so that progress can be tracked. JS logs for 2/24-3/6, due 3/4, & 3/7-3/13, due 3/18.

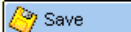
Figure 2: Notes for Seeker Screen

2. Click on the  **+ Add** button and the **Create Note for Seeker** screen will pop-up.

The screenshot shows a software window titled "Create Note for Seeker -". The interface includes the following fields and controls:

- Note Category:** A drop-down menu (callout 3).
- Date:** A text field showing "03/18/09" (callout 4).
- By:** A text field showing "MYRA HUHMANN" (callout 4).
- Subject:** A text field (callout 5).
- Notes:** A large text area for entering case notes (callout 6).
- Follow-up Date:** A text field (callout 7).
- Print on Save:** A checkbox (callout 8).
- Save:** A button with a floppy disk icon (callout 9).
- Close:** A button with a red X icon.

Figure 3: Create Note for Seeker Screen

3. In the **Note Category** field, select a note type from the drop-down menu.
4. The **Date** and **By** fields will auto populate with current date and counselor.
5. Enter a subject into the **Subject** field.
6. In the **Notes** field, enter a case note. **REMINDER:** Do not include abbreviations, information related to domestic violence or medical history, etc.
7. A date can be entered into the **Follow-up Date** field. Entering a date into this will place a task on your **Daily Schedule**.
8. Check the **Print on Save** field if you would like a copy of the case note for the client's file.
9. Click on the  **Save** button to save and close the screen.

Case Notes

Deleting a case note. A case note can be deleted by the case manager who entered it up to 4:00pm the same day it was issued.

The screenshot shows the 'Toolbox 2 (Test) - Seeker' application. The 'Seeker Screen' is open, displaying the 'Seeker Info' tab. The interface includes fields for Name and Address Information, Phone Numbers, Personal Information (Date of Birth, Age, Gender, etc.), and Seeker Status. A red callout box with the number '1' points to the 'Notes' icon in the top toolbar.

Figure 1: Notes Module


Step-by-Step:

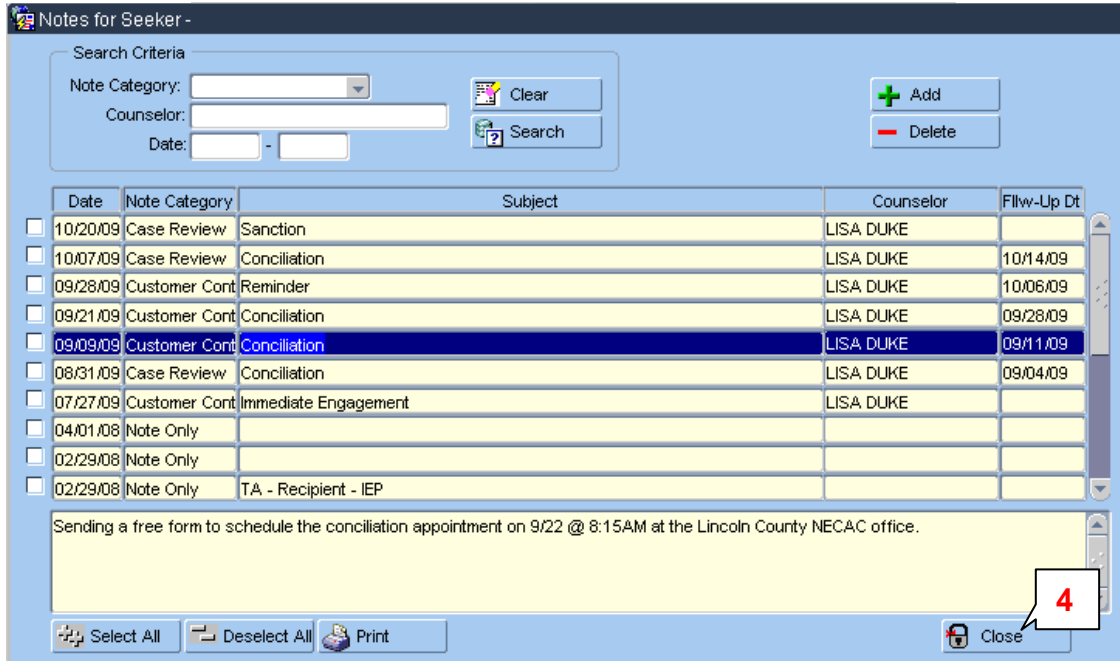
1. With a client's record open, click on the  **Notes** icon and the **Notes for Seeker** screen will pop-up.

The screenshot shows the 'Notes for Seeker' application window. It features a search criteria section at the top with fields for Note Category, Counselor, and Date. Below this is a table of notes. A red callout box with the number '2' points to the 'Date' column header, and another red callout box with the number '3' points to the 'Add' button.

Date	Note Category	Subject	Counselor	Follow-Up Dt
12/09/09	Case Review	Desk Aid Example	MYRA HUHMANN	
10/20/09	Case Review	Sanction	LISA DUKE	
10/07/09	Case Review	Conciliation	LISA DUKE	10/14/09
09/28/09	Customer Cont	Reminder	LISA DUKE	10/06/09
09/21/09	Customer Cont	Conciliation	LISA DUKE	09/28/09
09/09/09	Customer Cont	Conciliation	LISA DUKE	09/11/09
08/31/09	Case Review	Conciliation	LISA DUKE	09/04/09
07/27/09	Customer Cont	Immediate Engagement	LISA DUKE	
04/01/08	Note Only			
02/29/08	Note Only			

Figure 2: Notes for Seeker Screen

2. Select the case note you want to delete.
3. Click on the  button to delete the case note.



Notes for Seeker -

Search Criteria

Note Category:

Counselor:

Date: -

Clear

Search

+ Add

- Delete

Date	Note Category	Subject	Counselor	Fllw-Up Dt
<input type="checkbox"/> 10/20/09	Case Review	Sanction	LISA DUKE	
<input type="checkbox"/> 10/07/09	Case Review	Conciliation	LISA DUKE	10/14/09
<input type="checkbox"/> 09/28/09	Customer Cont	Reminder	LISA DUKE	10/06/09
<input type="checkbox"/> 09/21/09	Customer Cont	Conciliation	LISA DUKE	09/28/09
<input type="checkbox"/> 09/09/09	Customer Cont	Conciliation	LISA DUKE	09/11/09
<input type="checkbox"/> 08/31/09	Case Review	Conciliation	LISA DUKE	09/04/09
<input type="checkbox"/> 07/27/09	Customer Cont	Immediate Engagement	LISA DUKE	
<input type="checkbox"/> 04/01/08	Note Only			
<input type="checkbox"/> 02/29/08	Note Only			
<input type="checkbox"/> 02/29/08	Note Only	TA - Recipient - IEP		

Sending a free form to schedule the conciliation appointment on 9/22 @ 8:15AM at the Lincoln County NECAC office.

Select All Deselect All Print Close

Figure 3: Notes for Seeker Screen

4. Close the **Notes for Seeker** screen by clicking on the  button.

Case Notes

Editing a case note. A case note can be edited by the case manager who entered it up to 4:00pm the same day it was issued.

Figure 1: Notes Module

Step-by-Step:

1. With a client's record open, click on the  **Notes** icon and the **Notes for Seeker** screen will pop-up.

Date	Note Category	Subject	Counselor	Follow-Up Dt
12/09/09	Case Review	test	MYRA HUHMANN	
11/23/09	Employment Pl	Group Job search	SUSAN CARTER	
11/06/09	Customer Cont	group job search	BETH HAMILTON	
11/06/09	Customer Cont	attempted phone call	SUSAN CARTER	
10/26/09	Customer Cont	appt	BETH HAMILTON	
10/22/09	Customer Cont	postcard	BETH HAMILTON	
10/14/09	Customer Cont	appt	BETH HAMILTON	
10/14/09	Customer Cont	conciliation	BETH HAMILTON	
09/15/09	Customer Cont	appt	BETH HAMILTON	
09/14/09	Customer Cont	message left	TAMMY FORD	

Figure 2: Notes for Seeker Screen

2. Select the case note you want to edit.
3. Double click in the text portion of the case note and the **Editor** screen will pop-up.

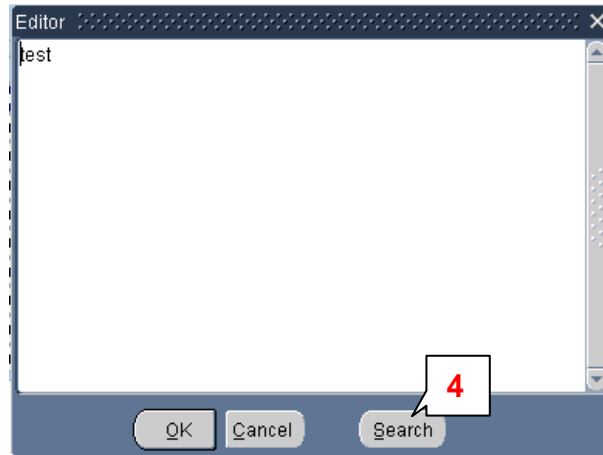


Figure 3: Editor Screen

4. Click on the **Search** button and a **Search/Replace** screen will pop-up.

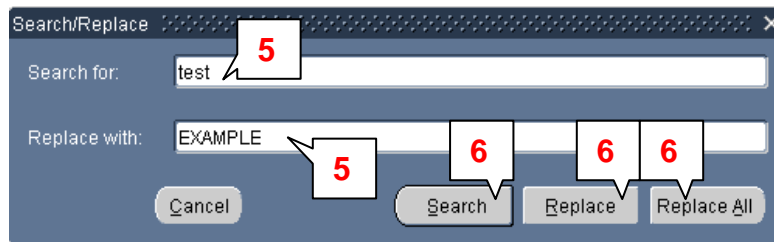


Figure 4: Search/Replace Screen

5. Enter the appropriate text in the **Search for:** field and **Replace with:** field.
6. Press the **Search** button and then either the **Replace** button or the **Replace All** button to correct the text.

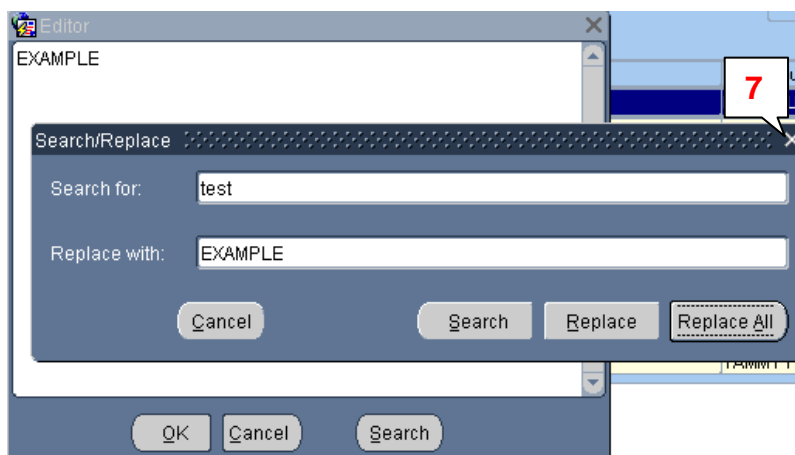


Figure 5: Search/Replace Screen and Editor Screen

7. When finished, press the **X** in the upper right corner to close the **Search/Replace** screen.

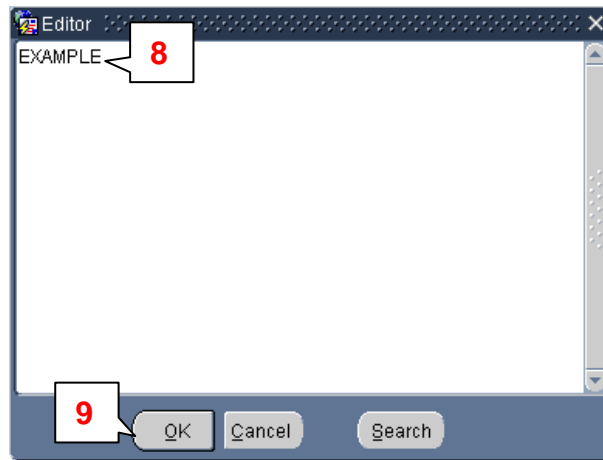



Figure 6: Editor Screen

8. The **Editor** screen will now display the corrected text.
9. Press the  button to close the screen.

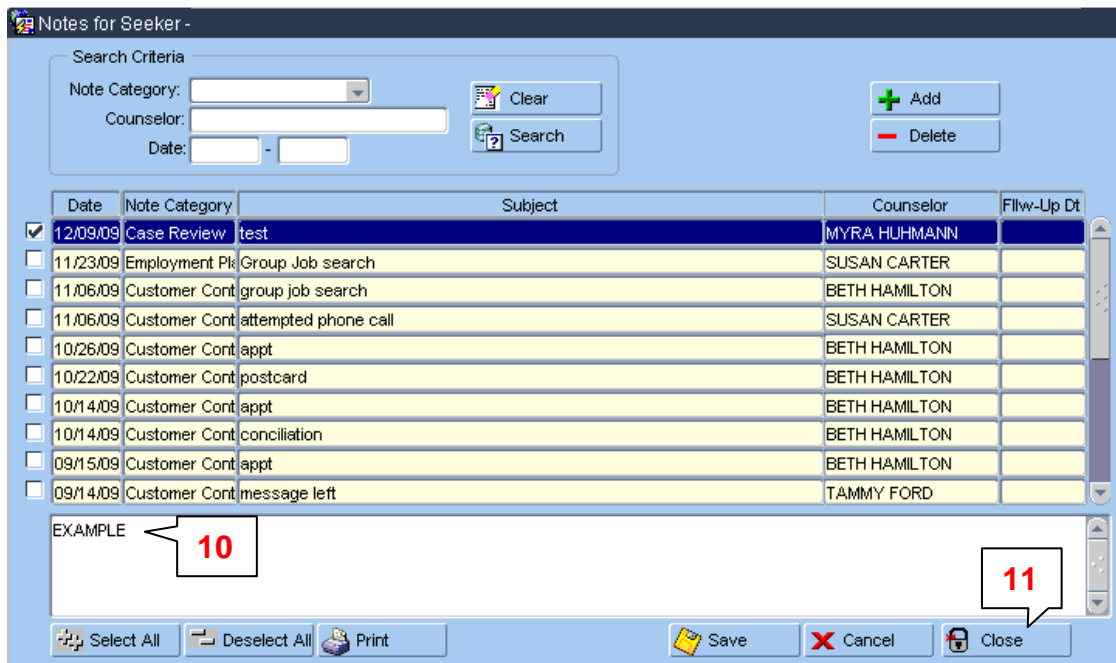
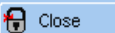


Figure 7: Notes for Seeker Screen


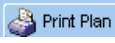
10. The **Notes for Seeker** screen will now display the corrected text.
11. Close the **Notes for Seeker** screen by clicking on the  button.

Employment Plan

Printing the Employment Plan. [Information regarding the ONet, Goal, Justification, and Service fields can be found under **Services**.]

Figure 1: Employment Plan-Enrollment Module/Employment Plan Tab

Step-by-Step:

1. Click on  **Employment Plan/Enrollment** icon.
2. Access the **Employment Plan** tab.
3. When all required information is entered, click on the  **Print Plan** button to print the Employment Plan.
4. Review the Employment Plan with the client.
5. The client is required to sign the Employment Plan.

Enrollment

Enrolling a client into CAP.

Toolbox 2 (Test) - Employment Plan

File Edit Navigation Options Utility MO Utility Window Help

Employment Plan No Primary Counselor Assigned

Enrollment Appropriateness Employment Plan Progress Closures

Eligible Enrollments

DWD Eligibility

Verify Date:

Referral System Programs

	Ref Dt	DCN ID	Teen	Two
<input type="checkbox"/> CAP Applicant	02/03/09	0011783885	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>

Other Potential DWD Programs

Enroll Agreement

Search MQ Show Closed Add Delete

Actual Enrollments

Program	Start Dt	End Dt	Teen	Two	Outcome
			<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	

External Counselor Two Parent Save Cancel

Record: 1/1 <OSC>

Figure 1: Employment Plan-Enrollment Module/Enrollment Tab

Step-by-Step:

1. Click on Employment Plan/Enrollment icon.

Counselor Assignment

Do you want to be assigned as the Primary Employment Counselor for this seeker?

Yes No

Figure 2: Counselor Assignment Screen

2. If a counselor has not been assigned to the client's record, a **Counselor Assignment** screen will pop-up with the question 'Do you want to be assigned as the Primary Employment Counselor for this seeker?'.
3. If you will be the primary counselor, click **Yes**.
4. If you will not be the primary counselor and you do not want to assign another person as primary counselor, click the **x** in the top right corner of the screen. If you will not be the primary counselor and you do want to assign another person as a counselor, click **No** to assign a person as the primary counselor.

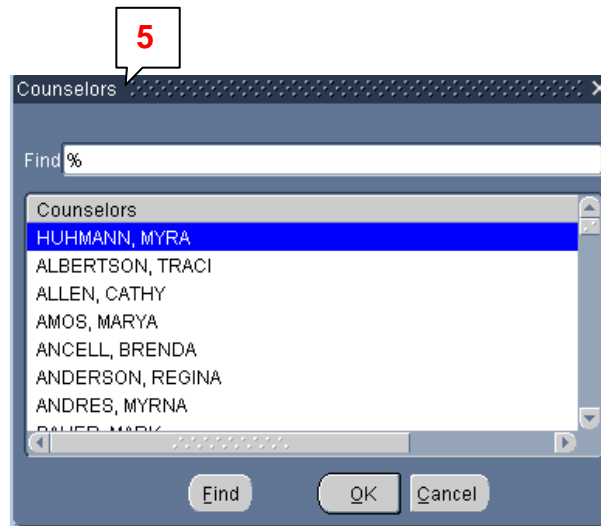


Figure 3: Counselor Screen

5. If you click **No**, a list of possible counselors will appear.

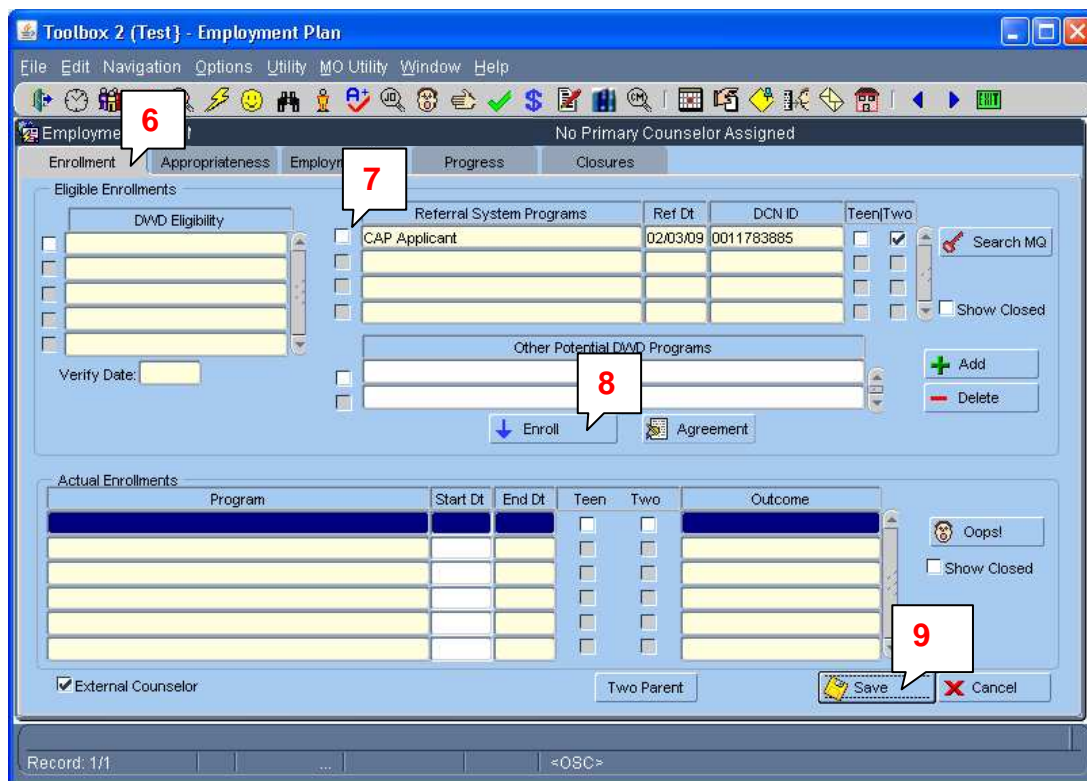


Figure 4: Counselor Screen

6. Select the **Enrollment** tab.
7. Under the section **Referral System Programs**, check/click the field to the left of the CAP Applicant or CAP Recipient referral.
8. Click the **Enroll** button to enroll the client into the CAP program. The referral will move from the **Referral System Programs** section to the **Actual Enrollments** section.
9. Click on the **Save** button to save the enrollment.

FSD Load Information Tab

The 'FSD Load Information' tab contains information from the "FSD Daily File" so the case manager can see the history of referrals including the date of referral, recipient contact information, work status, parent type, FSD Eligibility specialist and phone number, and grant information.

Table Data (from 'Loaded Dt' column):

Loaded Dt	Dcn	Ssn
10/29/2008	0051383984	
10/27/2008	0051383984	
08/24/2005	0051383984	
05/19/2005	0051383984	

Form Data (from 'FSD Load Information' tab):

Name: WORKMAN BRADY A
 Address1: 1651 W CROSSLAND ST
 Address2:
 City: OZARK
 State: MO Zip: 65721 Zip4: 7335
 Gender: M
 Dob: 03/04/1985
 Work Status: ZZ
 Referral Date: 10/28/2008
 Parent Type: 1
 Worker Name: CATHERINE PLEIN
 Worker Phone: 4175817511
 Im Grant: 0
 Fs Grant: 0
 Child Under 6:
 Child Care:
 Tanf Months:
 File Source: 0

Figure 1: Seeker History Module/FSD Load Information Tab

Step-by-Step:

1. Click on the **Seeker History** icon.
2. Click on the **FSD Load Information** tab.
3. The **Work Status** field indicates whether a client is an Applicant (**AA**), Mandatory (**DD**), Sanctioned (**SS**), Voluntary (**WW**), or if the client's case is Closed (**ZZ**).
4. The **Referral Date** is the date new information was electronically sent from FSD to DWD in the overnight batch.
5. **Parent Type** determines if the client is a Single Parent household (**1**) or a Two Parent household (**2**). If a **1** shows in this field for a Two Parent household, one of the parents met an exclusion at FSD prior to being referred to DWD.
6. The **Loaded Dt** is the date the information was loaded into Toolbox 2.0. Unless there is a problem loading the file, this date should be the business day following the **Referral Date**.

FSD TANF Participation Tab

The 'FSD TANF Participation' tab displays the federal work participation rate data sent to the Department of Health and Human Services (HHS). This information is used to: determine the core and non-core hours, AWE/CWEP maximum hours, and Community Service maximum hours displayed on the 'Employment Plan' tab; reflects the work participation rate status for the month; and display time-limited information activity information.

This screen is populated from the TANF Data Reporting (TDR) file which is loaded monthly. If the screen is blank, the TDR has not yet been loaded. This will cause the Core and Non-Core hours, as well as the AWE/CWEP-Community Service hours, to calculate incorrectly on the Employment Plan.

Toolbox 2 (Production) - Seeker Histories

File Edit Navigation Options Utility MO Utility Window Help

Seeker Services Change History: Notes Pay FSD TANF Participation

Report Dt: 10/01/2009 SSN: 0039017414 DCN: Southeast Region: Child Care: N Child Under 6 Y: Im Grant: 535 Fs Grant: 668 Work Status: DD CS Amt: 0

Activity	Hours	Exc Absences	Holiday	Total
Unsub Employment:	0	N/A	N/A	0
Sub Employment - Private:	0	N/A	N/A	0
Sub Employment - Public:	0	N/A	N/A	0
AWE/CWEP:	0	0	0	0
On the Job Training (OJT):	0	N/A	N/A	0
Job Search/JobReadiness:	0	0	0	0
Community Service:	0	0	0	0
Voc Education:	0	0	0	0
Job Skills Training:	0	0	0	0
Ed related to Employment:	0	0	0	0
High School:	0	0	0	0
Other:	0	N/A	N/A	0

Work Participation Rate Status:

Time-Limited Activity Tools:

Job Search Hours for Previous 12 Months: 0 Excused Absence Hours for Year: 0 Number of Voc Ed Months Used: 01

Record: 1/1

Figure 1: Seeker History Module/FSD TANF Participation Tab

Step-by-Step:

7. Click on the **Seeker History** icon.
8. Click on the **FSD TANF Participation** tab.
9. The **Report Dt** field indicates the date the of the latest federal work participation rate data. The report date is always from the month before. For example, if it reflects a date of 10/1/09, that information is for the September 2009 federal month. Therefore, when calculating time-limited activities, remember to include the most recent month that will not be displayed. [As a reminder, it takes approximately 45 days from the end of the month to load the data due to actual hours reporting. For example, the September 2009 will load by November 15, 2009.]
10. The **Region** field indicates which region the client was reported under for the federal work participation rate.
11. The **Work Status** field indicates what work status (AA, DD, SS, or WW) the client was reported under for the federal work participation rate.
12. The **Child Care** field indicates whether or not the household receives federally funded childcare (for a child included in the recipient's TA grant) from the Family Support Division

(FSD). This field is used to calculate the core hours for two-parent households on the 'Employment Plan' tab. Two-parent households with a child under 6 who do not receive federally funded child care are required to complete less core hours than those who receive federally funded child care.

13. The **Child Under 6** field indicates whether or not the household has a child under 6 (that is included in the recipient's TA grant). This information is used to calculate the core hours for single and two-parent households on the 'Employment Plan' tab. Single-parent households with a child under age 6 are not required to complete non-core hours while households with a child 6 and over are required to complete non-core hours. Two-parent households with a child under 6 who do not receive federally funded child care are required to complete less core hours than those who receive federally funded child care.
14. The **IM Grant** field indicates the amount of the recipient's household TA grant.
15. The **FS Grant** field indicates the amount of the recipient's household Food Stamp grant.
16. The **CS Amt** field indicates the amount of child support, if any, that was withheld by FSD due to the client receiving TA.
17. The number included under the **Hours, Exc (Excused) Absences, Holiday, and Total** indicates the number of activity hours reported in the work participation rate data file for each **Activity**.
18. The **Work Participation Rate Status** indicates if the federal work participation rate was met or if the client was in any other activity for the month including 'Assessment', 'Temporary Waiver', or 'Conciliation'.
19. The **Job Search Hours for Previous 12 Months** indicates the number of job search/ job readiness hours the recipient has used for the previous 12 months. The maximum hours is 240 hours for recipients with a 20 hour federal requirement and 360 hours for recipients with a 30 hour federal requirement and greater.
20. The **Excused Absence Hours for Year** indicates the number of excused hours the client has used for the year. Recipients are allowed up to 16 excused absence hours per month and 80 excused absence hours within the previous 12-month period.
21. The **Number of Voc Ed Months Used** indicates the number of 'Vocational Education and Training' activity months used. Recipients are allowed up to 12 months lifetime in 'Vocational Education and Training'.

NOTE: 'Job Search/Job Readiness' activity hours, 'Vocational Education and Training' months, and excused absence hours are only counted if the recipient meets full participation for the month. If full participation is not met, these activity hours are reported in an "Other" category.

AWEP/CWEP, Community Service, and Core/Non-Core Hours Calculated

Data from the FSD TANF Participation tab is used to calculate the AWEP/CWEP and Community Service Program hours as well as the Core / Non-Core hours on the Employment Plan module.

Toolbox 2 (Production) - Employment Plan

File Edit Navigation Options Utility MO Utility Window Help

Employment Plan - Enrollment Appropriateness **Employment Plan** Closures

☐ Show Closed Services ☐ Show Closed Tasks EO Notice: Plan: 1 of 1

Start Date: 09/25/09 Closed: ONet: 31909200 Medical Assistants

Goal: Danna is seeking to obtain employment as a Medical Assistant; she is also interested in obtaining Medical Assistant certificate at Metro Business

Justification: To be able to provide a stable environment for her family.

LMI

Objective: Employment-Related Education Start Date: 09/29/09

Service: CAP Occupational/Vocational Education Hours: 40

FEIN: Hourly Wage: Actual Start Date: 09/29/09

End Date: Outcome: Add Task Del Task

Objective: Start Date: 11/19/09

Service: Hours: Del Service

Schedule Print Plan New Plan Del Plan Save Cancel

Employment-Related Education

CAP Occupational/Vocational Education

Add Service Comments Verification

FSD Months on TANF: 2

Max After 7/24/09: 166

Max Before 7/24/09: 171

Core: 20

Non-Core: 0

Payment DESE

Start Date of the Employment plan

Record: 1/1 <OSC>

Figure 1: Employment Plan-Enrollment Module/Employment Plan Tab

1. Click on **Employment Plan/Enrollment** icon.
2. Click on **Employment Plan/Enrollment** tab.
3. Maximum AWEP/CWEP and Community Service hours after 7/24/09 for the month will display.
4. Maximum AWEP/CWEP and Community Service hours before 7/24/09 for the month will display.
5. The required core and non-core hours display. Please note these hours are the federally required hours not to sanction. To pay TRE, an increased amount of core hours for single-parent households is required. These hours are not the hours that should be communicated to the TA recipient.

Generic O*Net Code

The generic O*Net code of 10-0000.00 is only used when an enrolled CAP Recipient has not completed an Employment Plan and/or the O*Net code is not entered on conversion records.

Below are examples of when to use this code:

- When a two-parent household is referred to CAP for Immediate Engagement and only one parent complies - Enter the conciliation service as soon as you have determined that Parent #2 has not come in to participate. If there is no record of Parent #2 in the Missouri Career Source system, Toolbox 2.0 will prompt you to enter an O'NET code on the Employment Plan. It is then appropriate to enter the "default" O'NET.
- If the record is a conversion record from Toolbox 1.0 and meets the criteria above – the "default" O'NET code should already be entered on the Employment Plan. If not, it is appropriate to use this code.

In the *Goal* and *Justification* boxes (which are required fields) on the Employment Plan, simply enter "conciliation" in both boxes; (replace the word 'Converted' with 'conciliation' for conversion records). This will be a reminder to whoever is working with that individual of the Recipient's current status. When the customer comes in to comply, you will know to change the information in the boxes, as it no longer applies.


Entering the generic O*Net code (in situation described above).

The screenshot shows the 'Toolbox 2 (Test) - Employment Plan' window. The 'Employment Plan' tab is selected. The 'Start Date' is 02/27/03. The 'O*Net' field contains '10000000'. The 'Goal' field contains 'Conciliation'. The 'Justification' field contains 'Conciliation'. The 'Objective' field contains 'Assessment'. The 'Start Date' field contains '11/19/09'. The 'Service' field contains 'CAP Conciliation'. The 'FEIN' and 'Hourly Wage' fields are empty. The 'Task 1' field is empty. The 'End Date' and 'Outcome' fields are empty. The 'Comments' field contains 'N/A Two Parents household, 20 hours required.'. The 'Save' button is highlighted. The 'Add Service' button is also visible. The 'Training Weeks' section shows 'FSD Months on TANF: 48', 'Max After 7/24/09: 127', 'Max Before 7/24/09: 131', 'Core: 30', 'Non-Core: 5', 'Remedial: 0', and 'Occupational: 0'. The 'Total' is 0. The 'Payment' and 'DESE' buttons are at the bottom right. The 'Explanation of the employment plan goal (FF)' is at the bottom left.

Figure 1: Employment Plan-Enrollment Module/Employment Plan Tab

Step-by-Step:

1. Click on **Employment Plan/Enrollment** icon.
2. Click on the **Employment Plan** tab.

3. Enter '10000000' into the **ONet** field.
4. In the field **Goal**, enter 'Conciliation'.
5. In the field **Justification**, enter 'Conciliation'.
6. In the **Objective/Service** fields, select 'Assessment' and 'CAP Conciliation'.
7. Enter the appropriate date into the **Start Date** field.
8. Click the  Save button.

Immediate Engagement

Once a TA Applicant has completed an assessment and enrolled in CAP, FSD needs to be notified that the Recipient has complied with Immediate Engagement.

Toolbox 2 (Test) - Employment Plan

File Edit Navigation Options Utility MO Utility Window Help

Employment Plan

Appropriateness Employment Plan Progress Closures

CAP

If applicable, describe how Age is a barrier to employment and training
Client states that this is not a barrier at this time.

If applicable, describe how Appearance is a barrier to employment and training
Client states that this is not a barrier at this time.

If applicable, describe how Attitude is a barrier to employment and training
Client states that this is not a barrier at this time.

Describe what the participant's strengths are
positive attitude

Occupational Goals

Short Term:
Obtain part time employment in retail.

Long Term:
Obtain part time employment in retail.

Educational Goals

Short Term:
Attain HSD

Long Term:
Attend community college

Completed Date: Training Services must be added to plan by: Record 1 of 1 + Add Save Cancel

Record: 1/1 <OSC>

Figure 1: Employment Plan-Enrollment Module/Appropriateness Tab/CAP Sub-Tab

Step-by-Step:

1. Click on **Employment Plan/Enrollment** icon.
2. Click on the **Appropriateness** tab.
3. Click on the **CAP** sub-tab.
4. Complete the **Occupational Goals: Short Term**.
5. Complete the **Occupational Goals: Long Term**.
6. Complete **Educational Goals: Short Term**.
7. Complete **Educational Goals: Long Term**.
8. Click on the **Save** button. This will send a 'Complied With Immediate Engagement' alert to FSD. [Confirm the alert was sent by reviewing the **Seeker Service** tab found within the **Seeker History** module.]

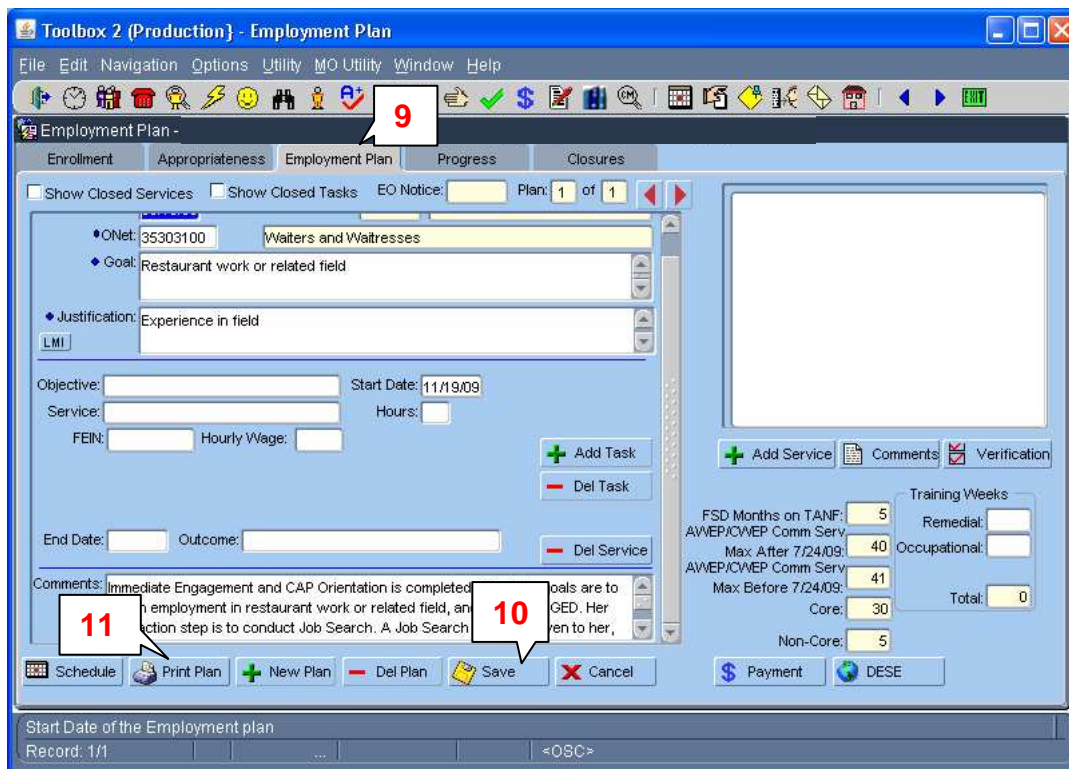




Figure 2: Employment Plan-Enrollment Module/Employment Plan Tab

9. Access the **Employment Plan** tab.
10. Click the  **Save** button.
11. Click the  **Print Plan** button to print the Individual Employment Plan (IEP). The recipient is required to sign and date the IEP.

Letters

On 1/15/10, the revised “Letter” was effective. The following letters can be sent to TA recipients:

- CAP Call-In Letter #1
- Voluntary Callin Letter #1
- Voluntary Pre-Enrollment and Post-Enrollment Conciliation Free-Form Letter
- Mandatory Pre-Enrollment and Post-Enrollment Conciliation-Sanction Free-Form Letter
- Pre-Enrollment Reengagement
- Post-Enrollment Reengagement
- Free Form

Issuing Call-In Letters

To access a list of recipients pending for a specified call-in letter, and select letters to be mailed.

Call-In letters include:

- CAP Call-In Letter #1
- Pre Enrollment Reengagement Letter
- Voluntary Callin Letter #1

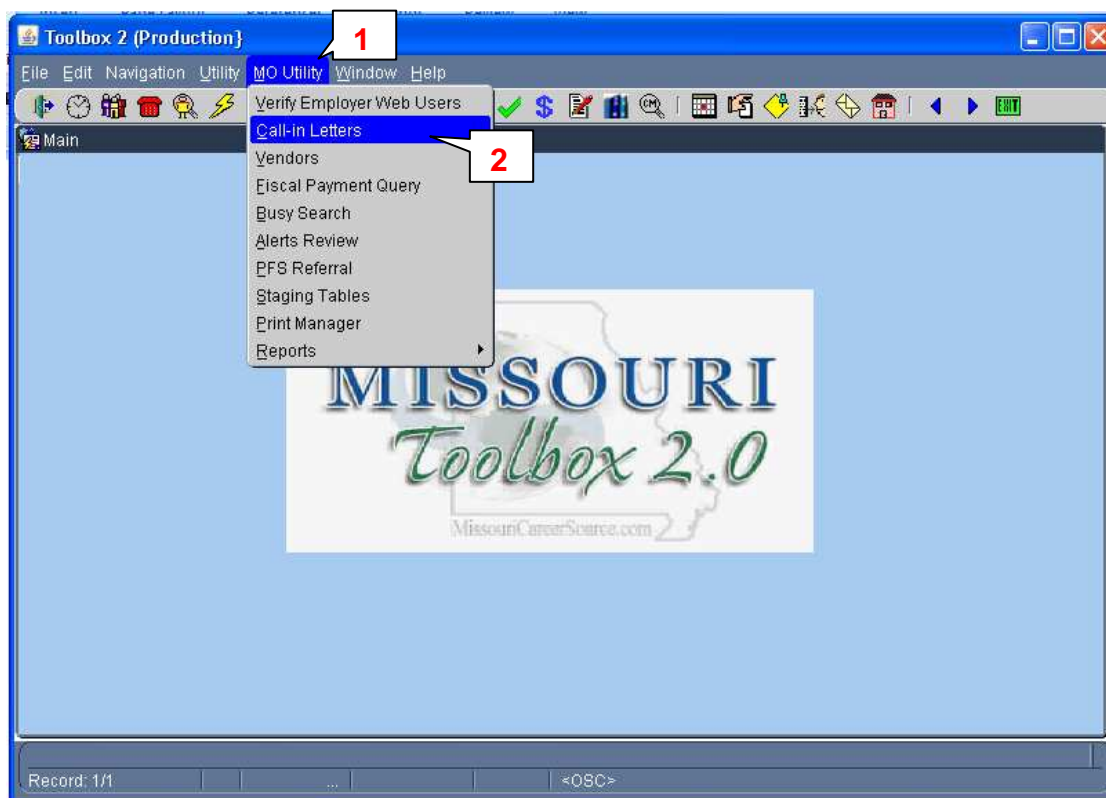


Figure 1: MO Utility Menu/Call-In Letters Option

Step-by-Step:

1. Click on the **MO Utility** MO Utility menu
2. Select **Call-In Letters**.

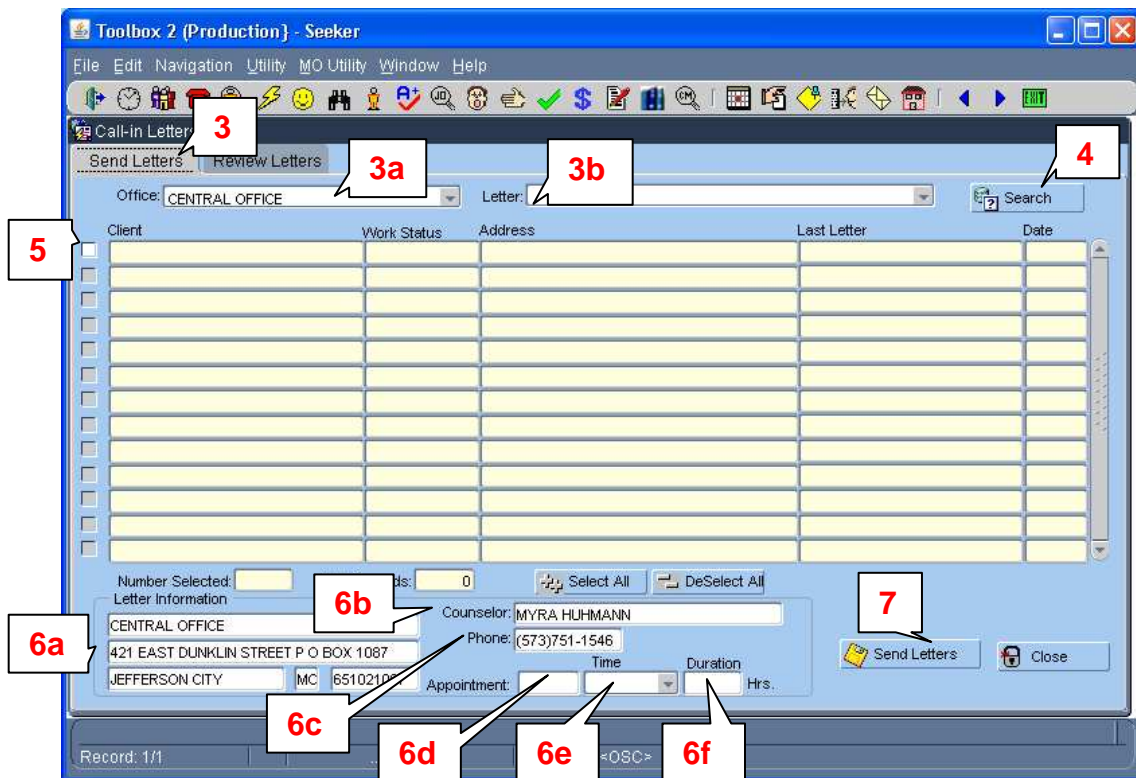




Figure 2: MO Utility Menu/Call-In Letters Option/Send Letters Tab

Step-by-Step:

3. On the **Send Letters** tab:
 - a. Choose the **Office**.
 - b. Choose the **Letter** which includes: CAP Call-In Letter #1, Pre Enroll Engagement, and Voluntary Callin Letter #1
4. Press the  **Search** button to access a list of recipients pending for the office and letter type specified. (Example: a list of recipients from the Kennett Career Center who should next receive the CAP Call-In Letter #1.)
5. To send a letter, select the appropriate recipient's record(s) by checking the field to the left of the recipient's name.
6. With the recipient's record selected, if necessary, you can alter allowable fields including:
 - a. **Letter Information** (includes name of CAP service provider, mailing address, city, state, and zip code),
 - b. **Counselor**,
 - c. **Phone** (counselor's phone number),
 - d. **Appointment Date**,
 - e. **Time** (appointment time), and
 - f. **Duration**.
7. To finish, click on the  **Send Letters** button to send letters. The letters will be mailed from DWD Central Office.

Reviewing Call-In Letters

Reviewing letters after they have been sent.

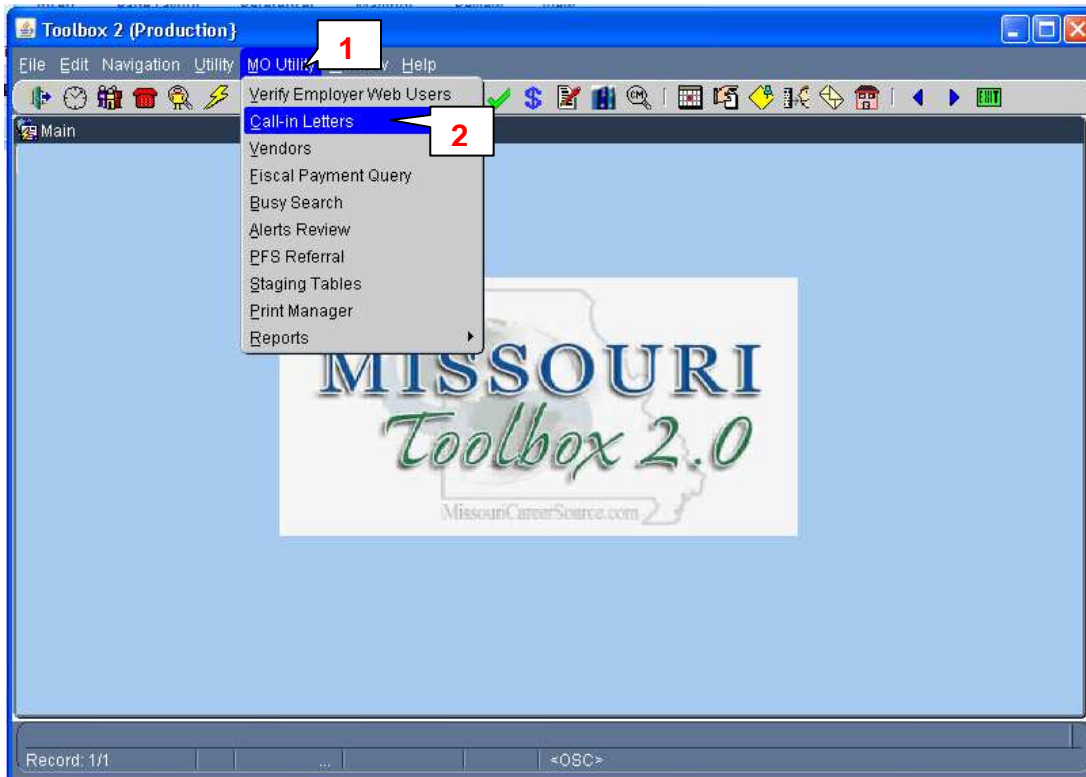


Figure 1: MO Utility Menu/Call-In Letters Option

Step-by-Step:

1. Click the **MO Utility** MO Utility menu
2. Select **Call-In Letters**.

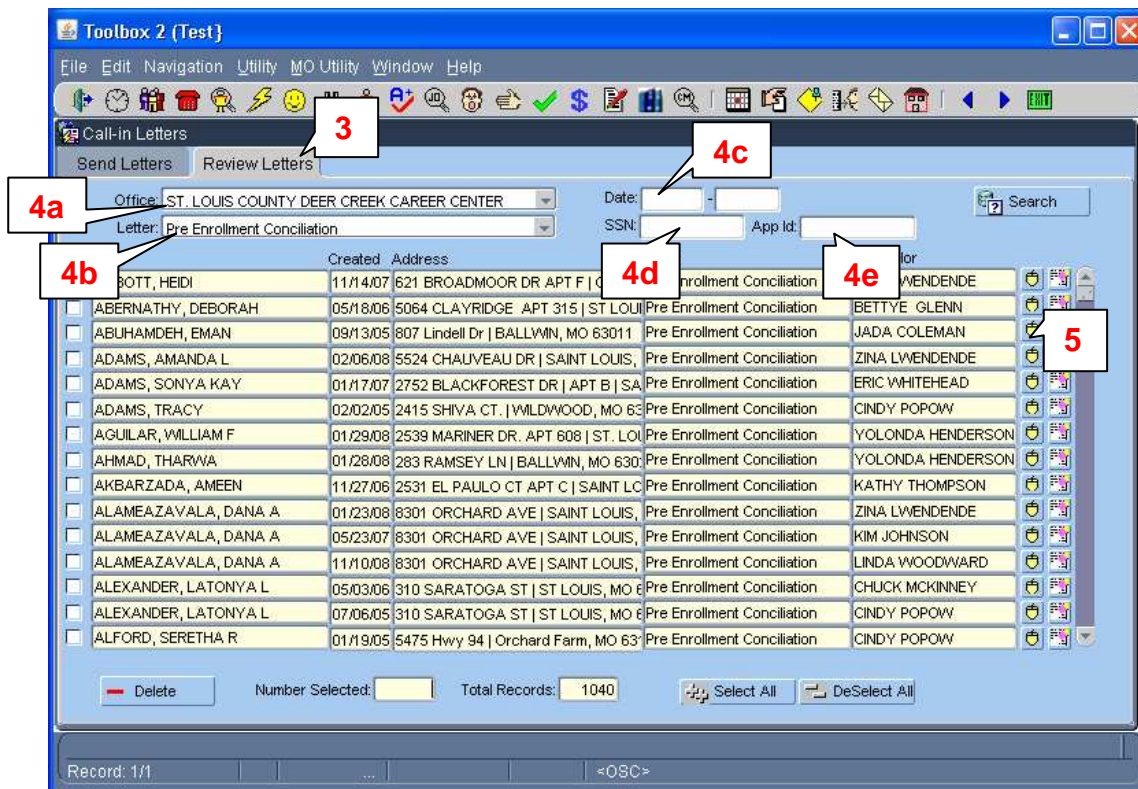



Figure 2: MO Utility Menu/Call-In Letters Option/Review Letters Tab

3. Click on the **Review Letters** tab.
4. To find a specific letter type or recipient, search by one or more of the following fields:
 - a. **Office,**
 - b. **Letter,**
 - c. **Date,**
 - d. **SSN,** and/or
 - e. **App ID.**
5. To review a specific letter for a recipient, press the  button associated on the recipient's line entry with the desired 'Letter' type.

Editing/Resending Call-In Letters

Letters can be edited to change the counselor name, phone number, appointment date, time, and duration. This can be done on the same day letters are issued, or when a letter needs to be resent because policy was not followed or a letter was returned with an updated address.

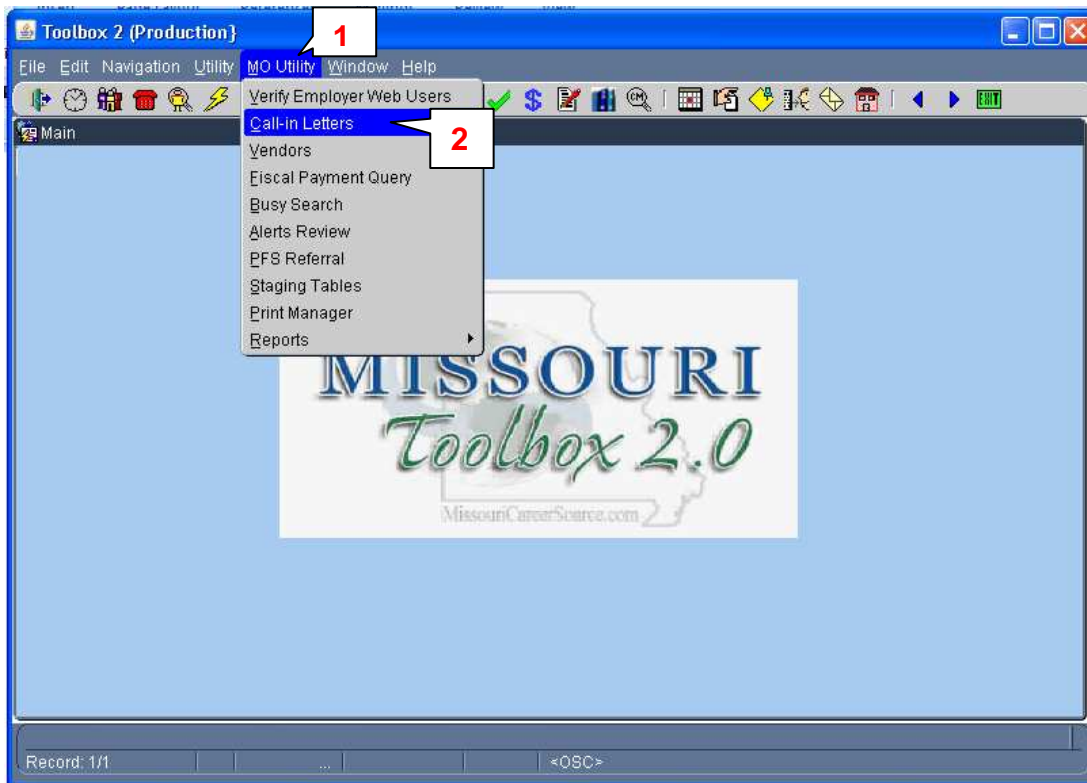


Figure 1: MO Utility Menu/Call-In Letters Option

Step-by-Step:

1. Click on **MO Utility** MO Utility menu.
2. Select **Call-In Letters**.

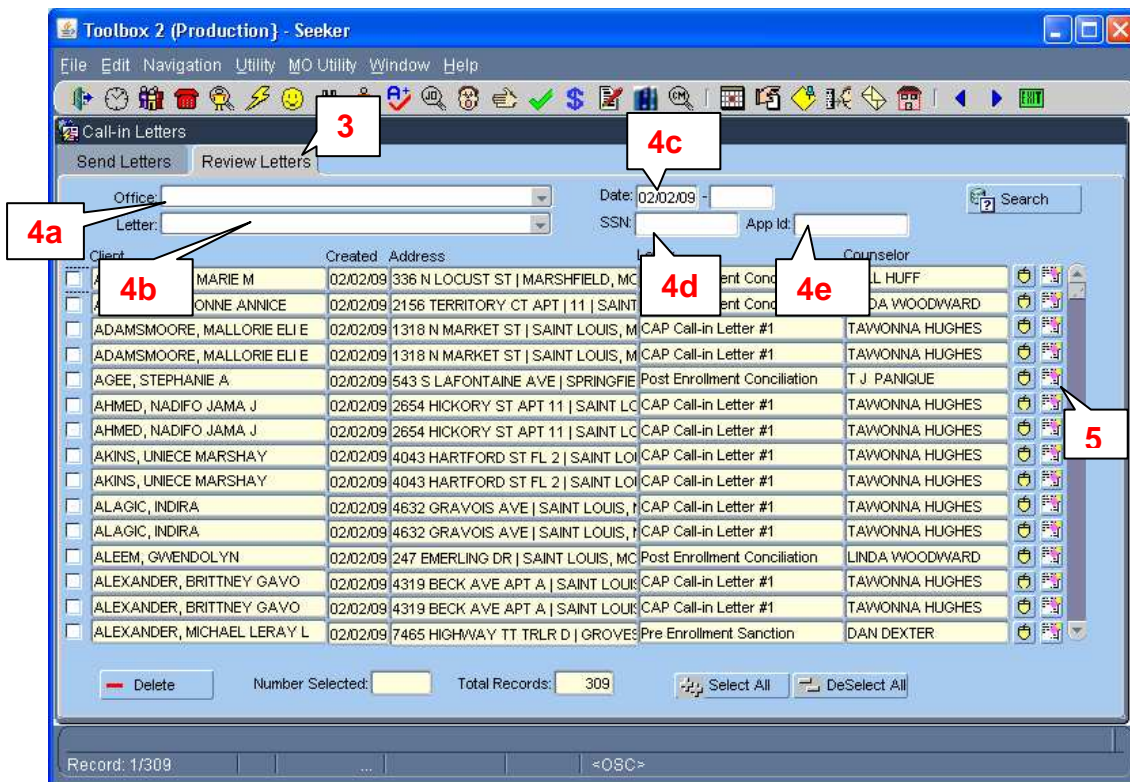


Figure 2: MO Utility Menu/Call-In Letters Option/Review Letters Tab

3. Click on the **Review Letters** tab.
4. Find the desired letter to edit by searching with the following fields:
 - a. **Office**,
 - b. **Letter**,
 - c. **Date**,
 - d. **SSN**, and/or
 - e. **App Id**.
5. To review a specific letter for a recipient, press the button associated on the recipient's line entry with the desired 'Letter' type.

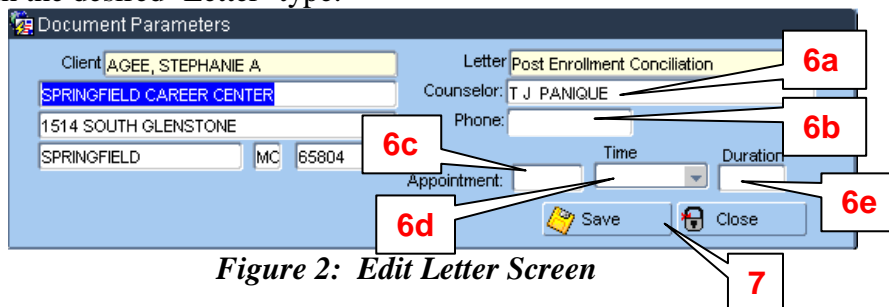


Figure 2: Edit Letter Screen

6. An **Edit Letter** screen will pop up. This screen will allow you to edit the:
 - a. Counselor,
 - b. Phone,
 - c. Appointment Date,
 - d. Time, and/or
 - e. Duration fields.

[The conciliation letters will also require you to input an appointment date/time/duration even though it is not displayed in the actual letter.]

7. Once you are finished editing fields, press the **Save** and **Close** buttons.

NOTE: Letters may be edited until 4:00pm the same day they were issued.

Deleting Call-In Letters

Deleting letters after they have been issued.

There are two way to delete Call-In Letters.

These instructions cover Option #1.

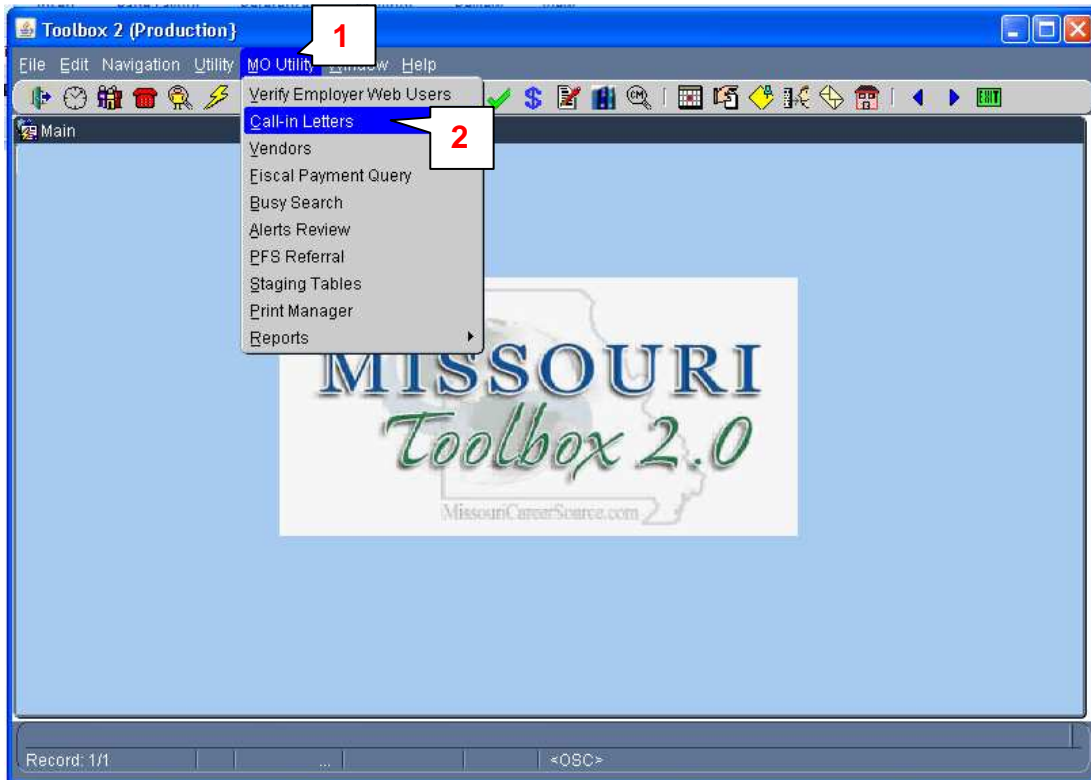


Figure 1: MO Utility Menu/Call-In Letters Option

Step-by-Step:

1. Click on the **MO Utility** menu.
2. Select **Call-In Letters**.

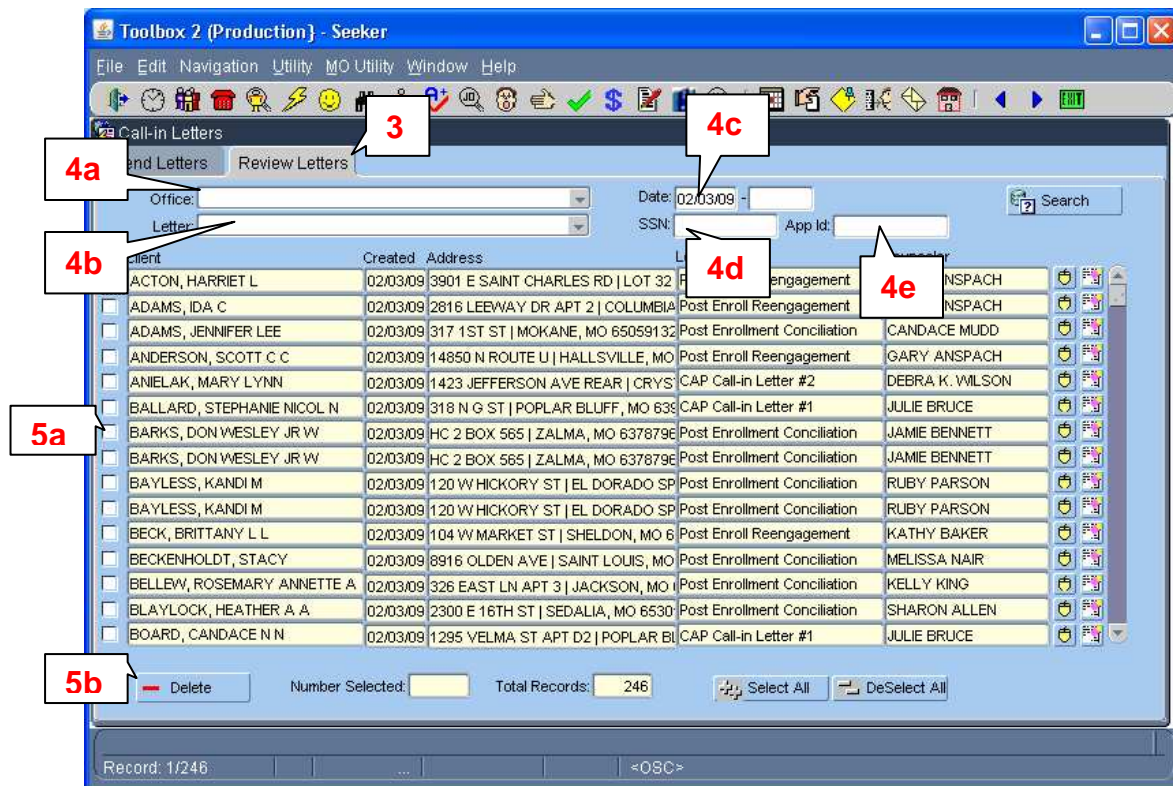

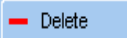


Figure 2: MO Utility Menu/Call-In Letters Option/Review Letters Tab

3. Click on the **Review Letters** tab.
4. Find the desired letter to delete by using the fields of:
 - a. **Office**,
 - b. **Letter**,
 - c. **Date**,
 - d. **SSN**, and/or
 - e. **App Id**.
5. To delete a specific letter for a recipient:
 - a. Check the field to the left of the recipient's name that is associated on the recipient's line entry with the desired 'Letter' type.
 - b. Press the  **Delete** button. If you have multiple letters to delete, check all entries that apply and press the  **Delete** button.

NOTE: Letters may be deleted until 4:00pm the same day they were issued.

These instructions cover Option #2.

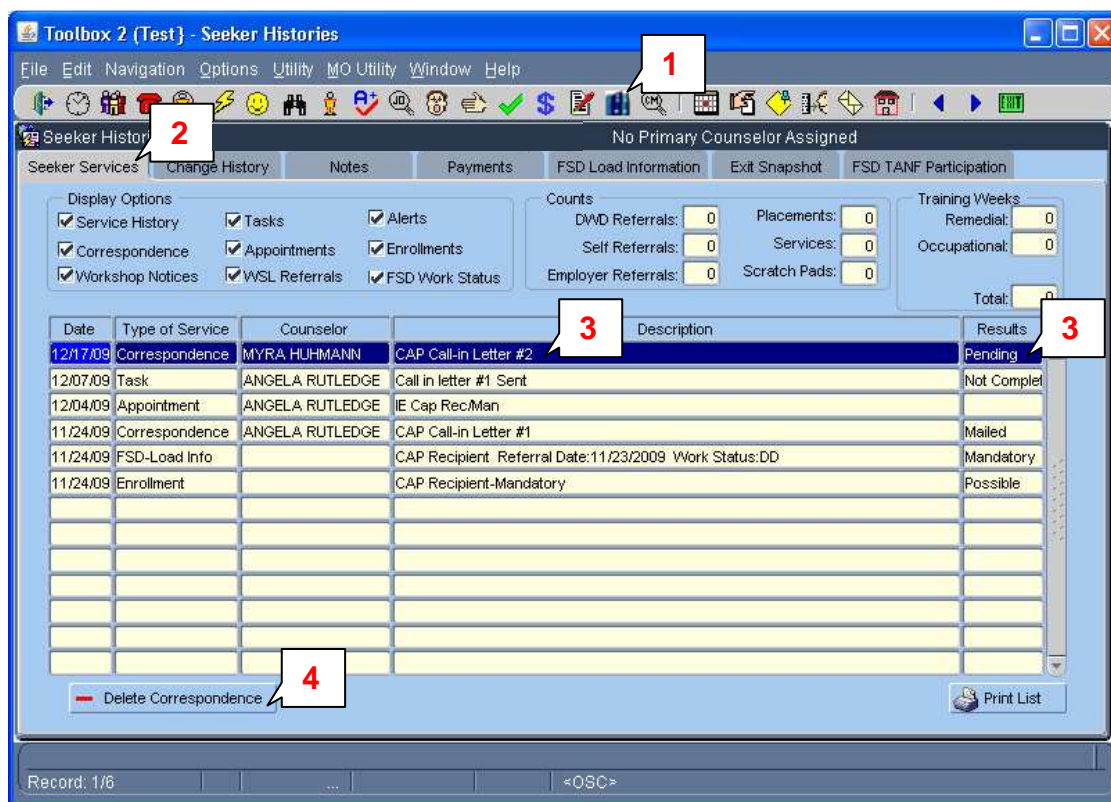




Figure 1: Seeker History Module/Seeker Services Tab

Step-by-Step:

1. Click on the  **Seeker History** icon.
2. Select the **Seeker Services** tab.
3. Select the letter you want to delete. [The letter must display **Pending** in the Results field.]
4. Press the  button.

NOTE: Letters may be deleted until 4:00pm the same day they were issued.

Free Form Letters

The following letters are sent to TA recipients by free-form letter:

- Voluntary Pre-Enrollment and Post-Enrollment Conciliation Free-Form Letter
- Mandatory Pre-Enrollment and Post-Enrollment Conciliation-Sanction Free-Form Letter
- Free-Form Letter for recipients who need additional contact

The ‘free-form’ letter language can be found within the “Letter” policy.

Accessing free form letters.

The screenshot shows the 'Toolbox 2 (Production) - Correspondence' application window. The 'Edit/Create' tab is active. The 'Correspondence For' field contains 'STIYANA MITIKE'. The 'Category' dropdown is set to 'General'. The 'Document Type' dropdown is set to 'Free Format Letter'. A large text area labeled 'Insert your text here' is available for input. At the bottom, there is an 'Additional Comments' field and buttons for 'Delete', 'Preview', 'Save', 'Cancel', and 'Close'. Numbered callouts 1 through 8 point to specific elements: 1 points to the 'Seeker Correspondence' icon, 2 points to the 'Edit/Create' tab, 3 points to the 'Category' dropdown, 4 points to the 'Document Type' dropdown, 5 points to the 'Insert your text here' text area, 6 points to the 'Additional Comments' field, 7 points to the 'Preview' button, and 8 points to the 'Save' button.

Figure 1: Correspondence Module/Edit-Create Tab

Step-by-Step:

1. Click on the **Seeker Correspondence** icon (or press Alt + C).
2. The **Edit/Create** tab will display.
3. From the **Category:** field, select 'General' from the drop down menu.
4. Double click in the **Document Type:** field and select 'Free Format Letter'.
5. An **Insert Your Text Here** field will appear. Type the necessary information into this field.
6. Use the **Additional Comments:** field to record additional comments, if applicable.
7. Click on the **Preview** button to preview and print the letter.
8. Click on the **Save** button to save the letter.

NOTE: DWD Central Office does not mail Free Format Letters; this is the responsibility of each office.

Issuing Post-Enrollment Letters

The following letters are sent to TA recipients using the post-enrollment letter function:

- Post Enrollment Reengagement

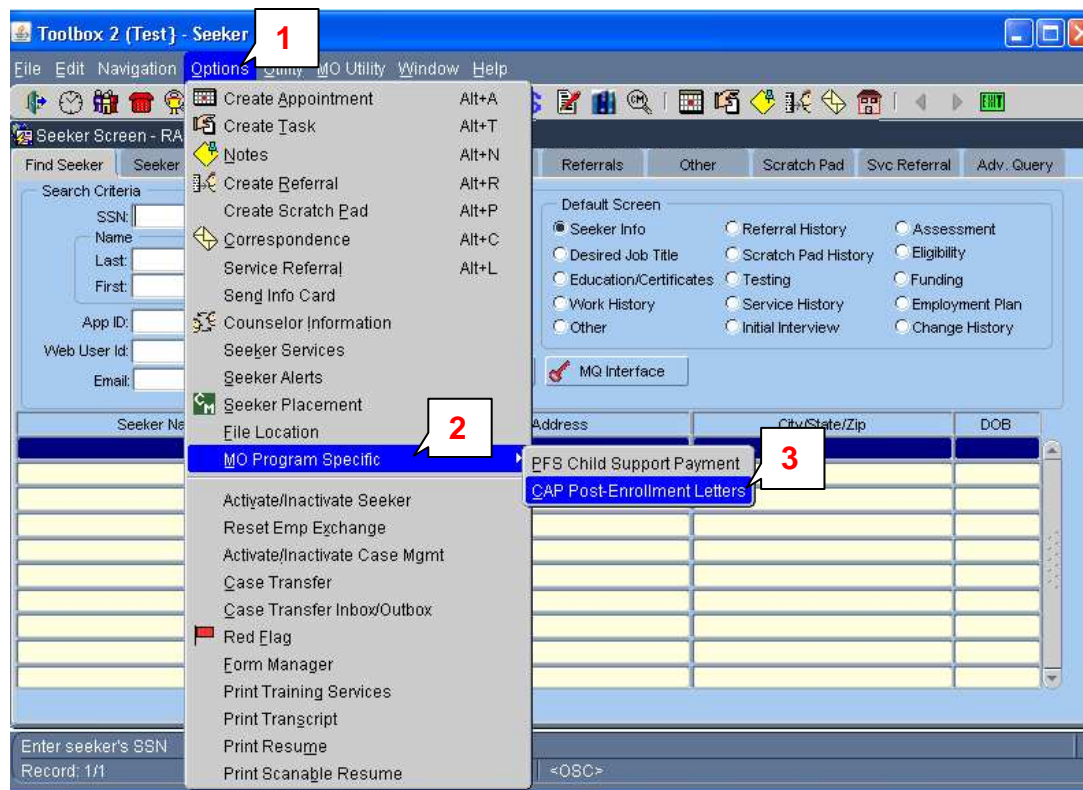


Figure 1: Options Menu/MO Program Specific Option/CAP Post-Enrollment Letters Option

Step-by-Step:

1. With a recipient's record open, click on the **Options** menu.
2. Select **MO Program Specific** option.
3. Select **CAP Post-Enrollment Letters**.

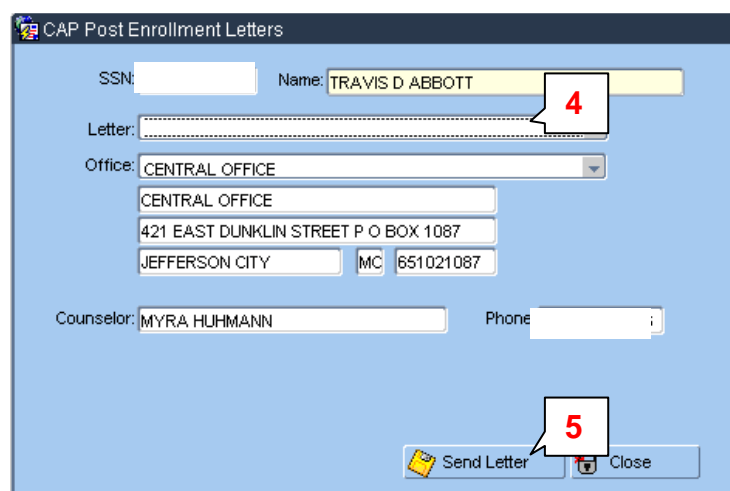


Figure 2: CAP Post Enrollment Letter

4. From the **CAP Post Enrollment Letters** pop-up screen, select the appropriate **Letter** from the drop down menu, and make any other necessary changes to the information displayed.
5. Click the **Send Letter** button to issue the letter.

Reviewing Post-Enrollment Letters

Post-Enrollment letters can be reviewed two different ways.

Instructions for Option #1.

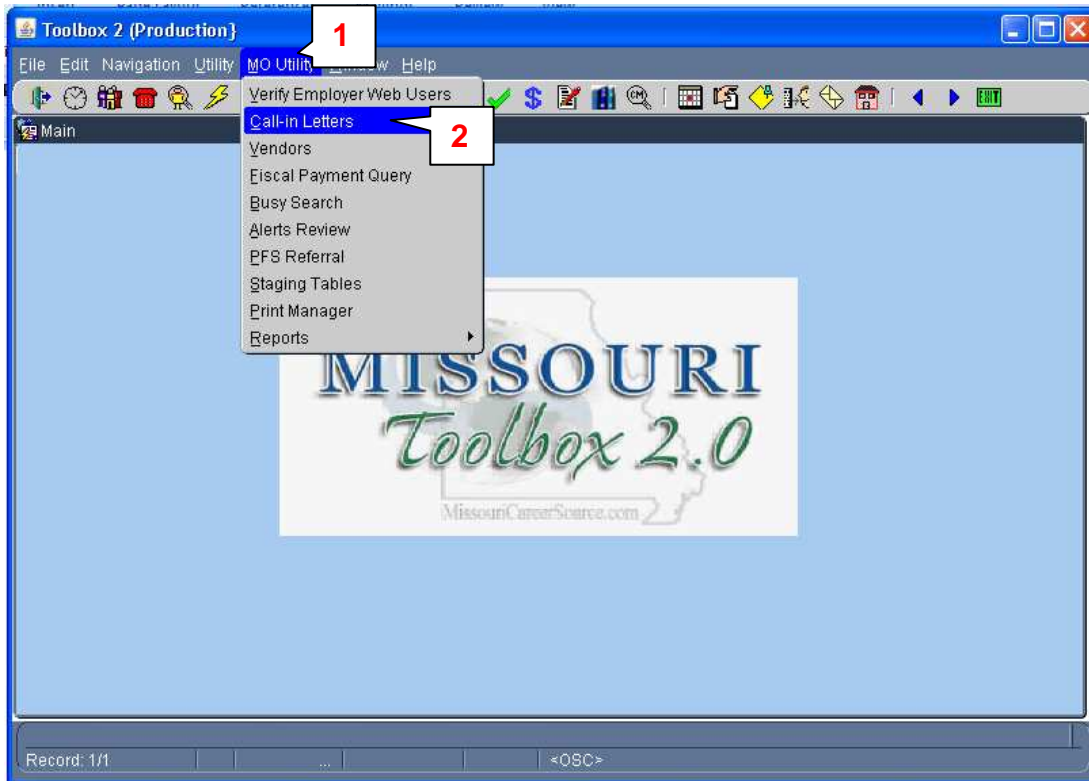


Figure 1: MO Utility Menu/Call-In Letters Option

Step-by-Step:

1. Click on the **MO Utility** menu.
2. Select **Call-In Letters**.

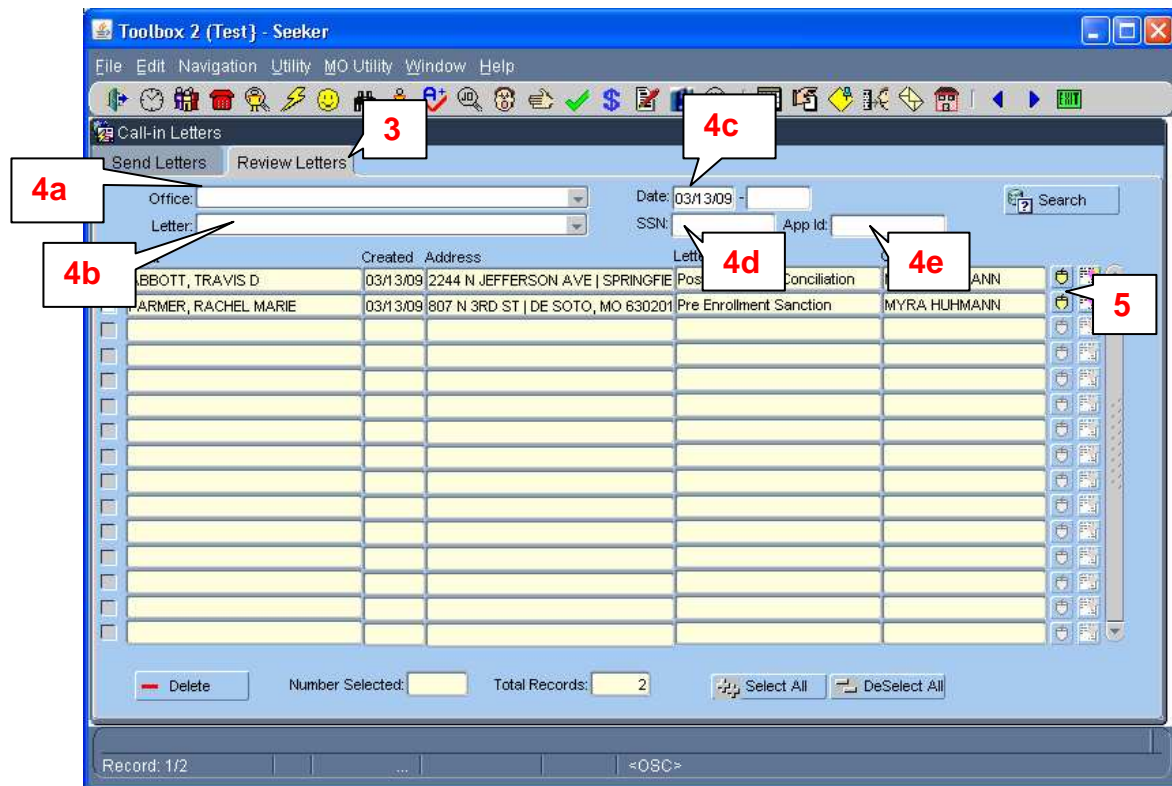



Figure 2: MO Utility Menu/Call-In Letters/Review Letters Tab

3. Click on the **Review Letters** tab.
4. To find a specific letter type or recipient, complete the appropriate field(s) including:
 - a. **Office**,
 - b. **Letter**,
 - c. **Date**,
 - d. **SSN**, and/or
 - e. **App Id**.
5. To review a specific letter for a recipient, press the  button associated on the recipient's line entry with the desired 'Letter' type.

Instructions for Option #2.

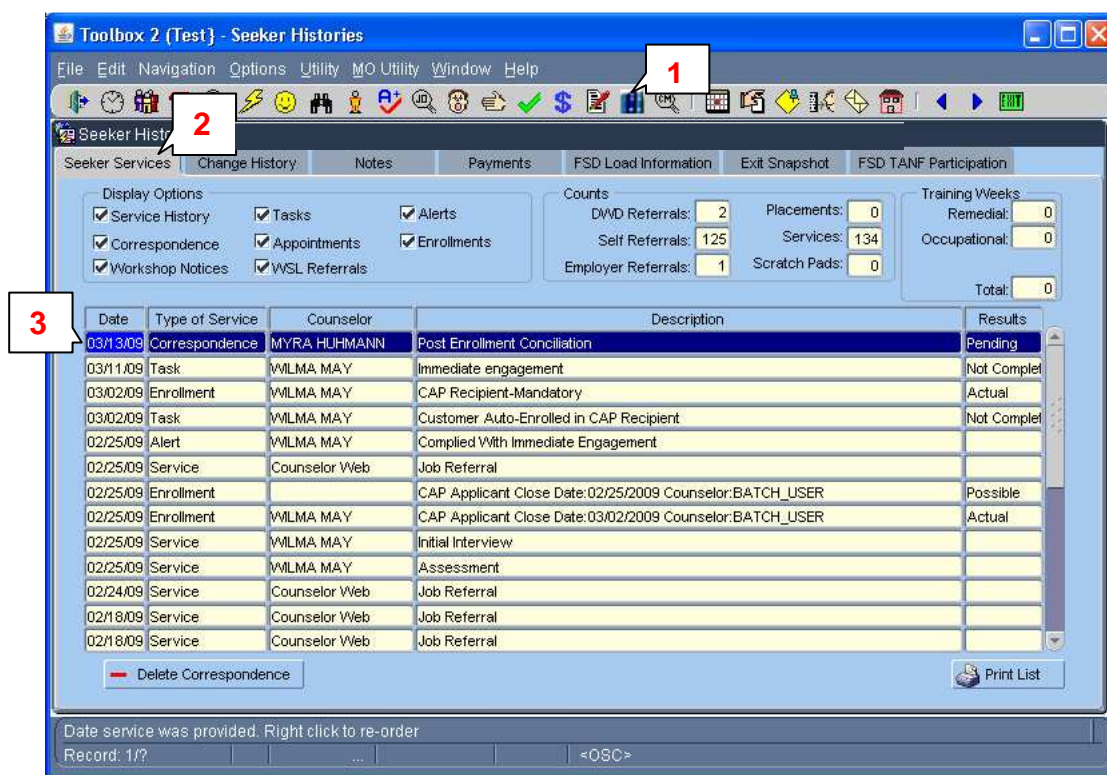



Figure 4: Seeker History/Seeker Services Tab

Step-by-Step:

1. Click on the  **Seeker History** icon.
2. The **Seeker Services** tab will display.
3. Double-click on the letter you want to review.

Deleting Post-Enrollment Letters

Post-Enrollment letters can be deleted two different ways.

Instructions for Option #1.

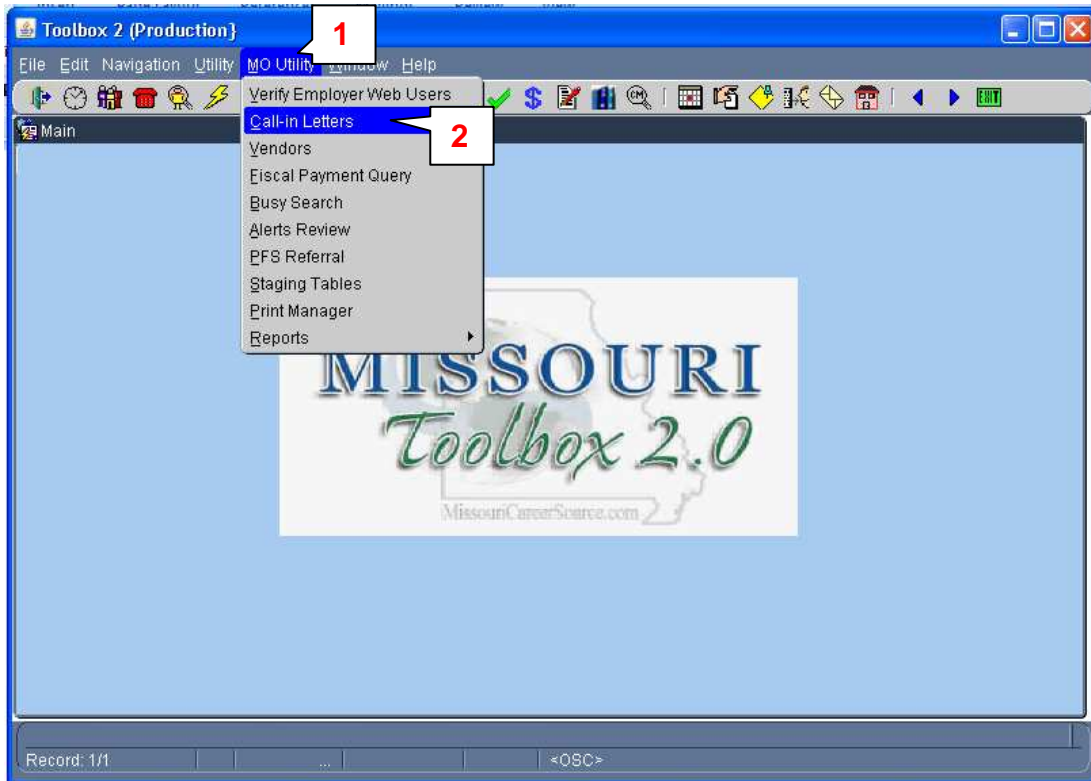


Figure 1: MO Utility Menu/Call-In Letters Option

Step-by-Step:

1. Click on the **MO Utility** menu
2. Select **Call-In Letters**.

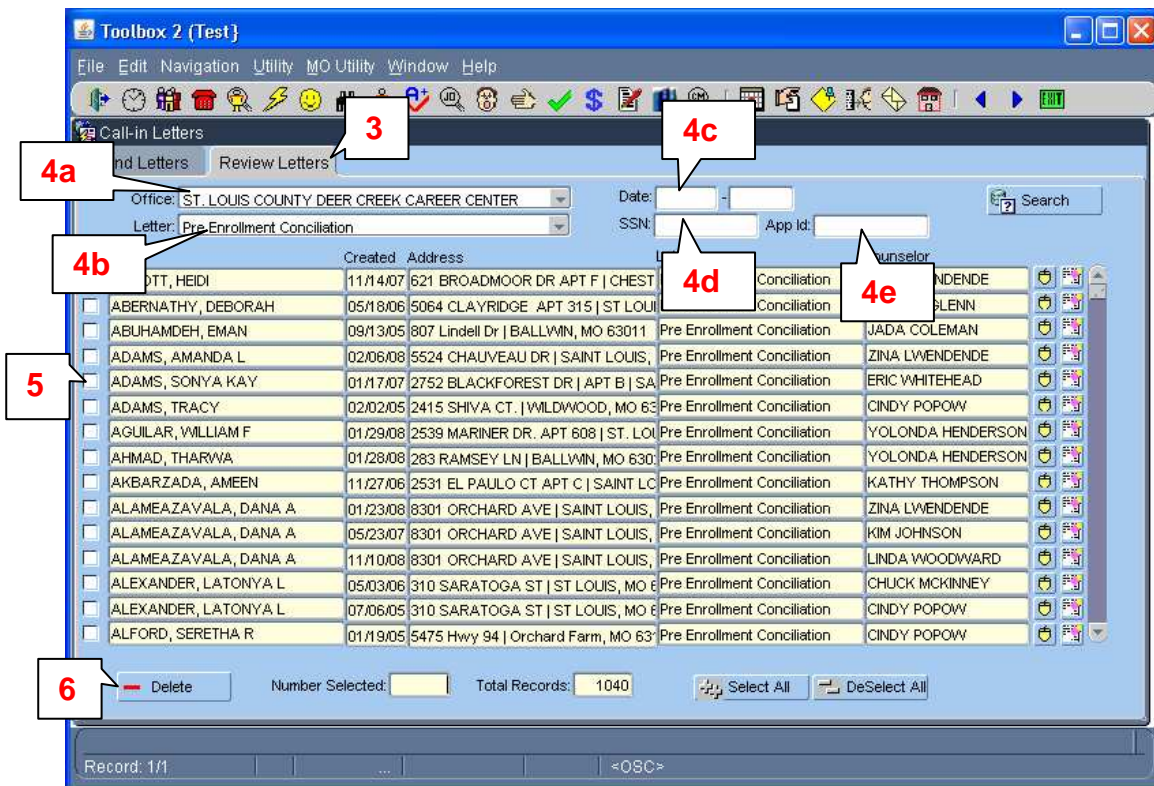



Figure 2: MO Utility Menu/Call-In Letters/Review Letters Tab

3. Access the **Review Letters** tab.
4. To find a specific letter type or recipient, complete the appropriate field(s) including:
 - a. **Office**,
 - b. **Letter**,
 - c. **Date**,
 - d. **SSN**, and/or
 - e. **App Id**.
5. To delete a specific letter for a recipient, check/click the field to the left of the recipient's name associated on the recipient's line entry with the desired 'Letter' type.
6. Click on the  **Delete** button.

Instructions for Option #2.

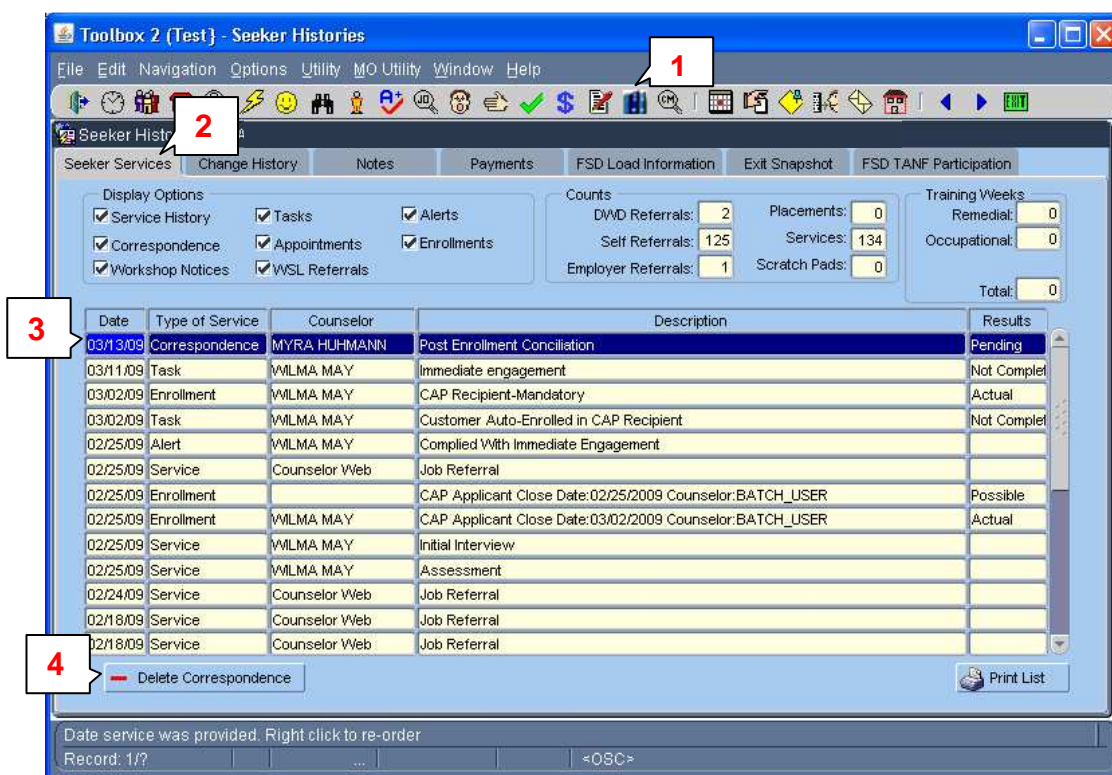




Figure 4: Seeker History/Seeker Services Tab

Step-by-Step:

1. Click on the  **Seeker History** icon.
2. The **Seeker Services** tab will display.
3. Highlight the letter you want to delete.
4. Click on the  **Delete Correspondence** button.

MQ Search

The MQ Search allows you to pull a referral from FAMIS the day the individual applied for Temporary Assistance (TA) benefits at FSD before it is sent to Toolbox 2.0 in the nightly files.

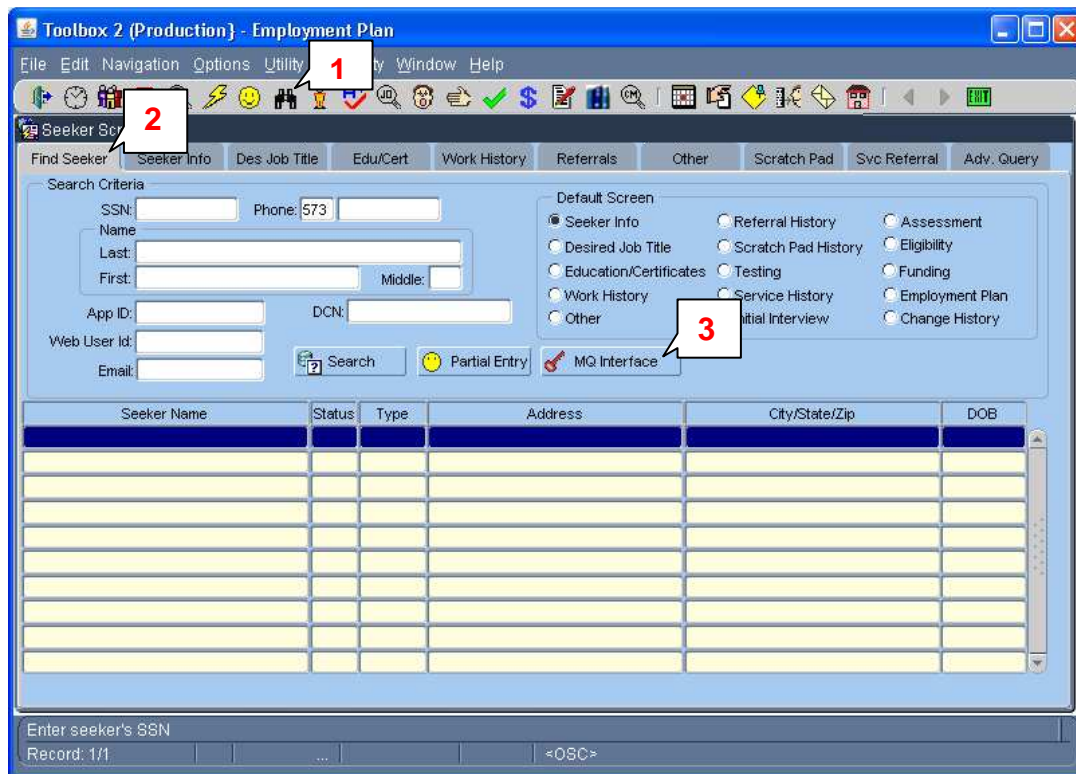




Figure 1: Seeker Correspondence/Forms Tab

Step-by-Step:

1. Click on the  **Find Seeker** icon.
2. The **Find Seeker** tab will display.
3. Click on the  **MQ Interface** button to access the MQ pop-up screen.

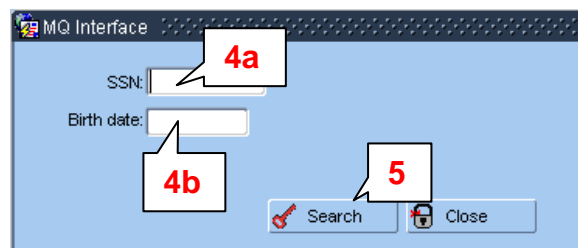



Figure 2: MQ Interface Pop-Up Screen

4. On the screen, enter the client's:
 - a. Social Security Number and
 - b. Date of Birth.
5. Click on the  **Search** button to perform the MQ search.

Toolbox 2 (Production) - Employment Plan

File Edit Navigation Options Utility MO Utility Window Help

Enrollment Appropriate Employment Plan Progress

Eligible Enrollments

DWD Eligibility

Referral System Programs

Other Potential DWD Programs

Verify Date:

Enroll Agreement

Actual Enrollments

Program	Start Dt	End Dt	Teen	Two	Outcome
CAP Recipient Sanctioned	12/04/08		<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	

☒ External Counselor

Save Cancel

Record: 1/1

Figure 3: Employment Plan-Enrollment Module/Enrollment Tab

Toolbox 2 (Production) - Seeker

File Edit Navigation Options Utility Window Help

Find Seeker Seeker Info Edu/Cert Work History Referrals Other Scratch Pad Svc Referral Adv. Query

Seeker Screen - SHERRY LYNN L. GERMAN

Name and Address Information: SHERRY LYNN L. GERMAN

Mailing Address: 28712 SW OUTER RD

Street Address:

Phone Numbers: Home: (816)405-0042 Cell: Work: Other: (816)419-7498

HARRISONVILLE MO 64701-7322

Bad Address Homeless Email:

Personal Information

Date of Birth: 04/15/1982

Age: 27

Gender: F

Citizen: Y

Alien Reg #: A

LEP:

☐ In School ☐ Disabled

☒ Searchable ☐ Individual

☒ Share resume ☐ Rapid Response

☐ Migrant Worker ☐ Deceased

Veteran Information

Vet Status: N - None

Transition:

☐ Recently Separated

☐ Served in Campaign

☐ Print on Summary (Resume)

☐ Service Ended by Disability

☐ Spouse of Deployed Guard/Reserve or spouse deployment ended w/ the past yr

Branch:

☐ Status Verified

Source: JACOB AWOSANMI

☐ Partial Seeker

☐ Restricted ☐ Secondary Counselor

Seeker Status

Status: Active

Date: 07/04/03

Last Update: 12/02/09

Case Management: Active

Next Appt:

UI Ben Year Beg Dt: Inactive

Next Task:

Job Contacts:

Actual Enrollments

Possible Enrollments: CAP Applicant

App ID: 12750874

DCN: 0038649713

Services Provided

Date	Type of Service	Employment Counselor

Web Info Save Cancel

Seeker's first name

Record: 1/1

Figure 4: Find Seeker Module/Seeker Info Tab

6. If a referral is available, it will appear on the:
 - a. **Enrollment** tab within the **Employment Plan/Enrollment** module, and
 - b. Under the **Possible Enrollments** field on the **Seeker Info** tab within the **Find Seeker** module.

If a referral is not available, you will receive a message indicating no information found.

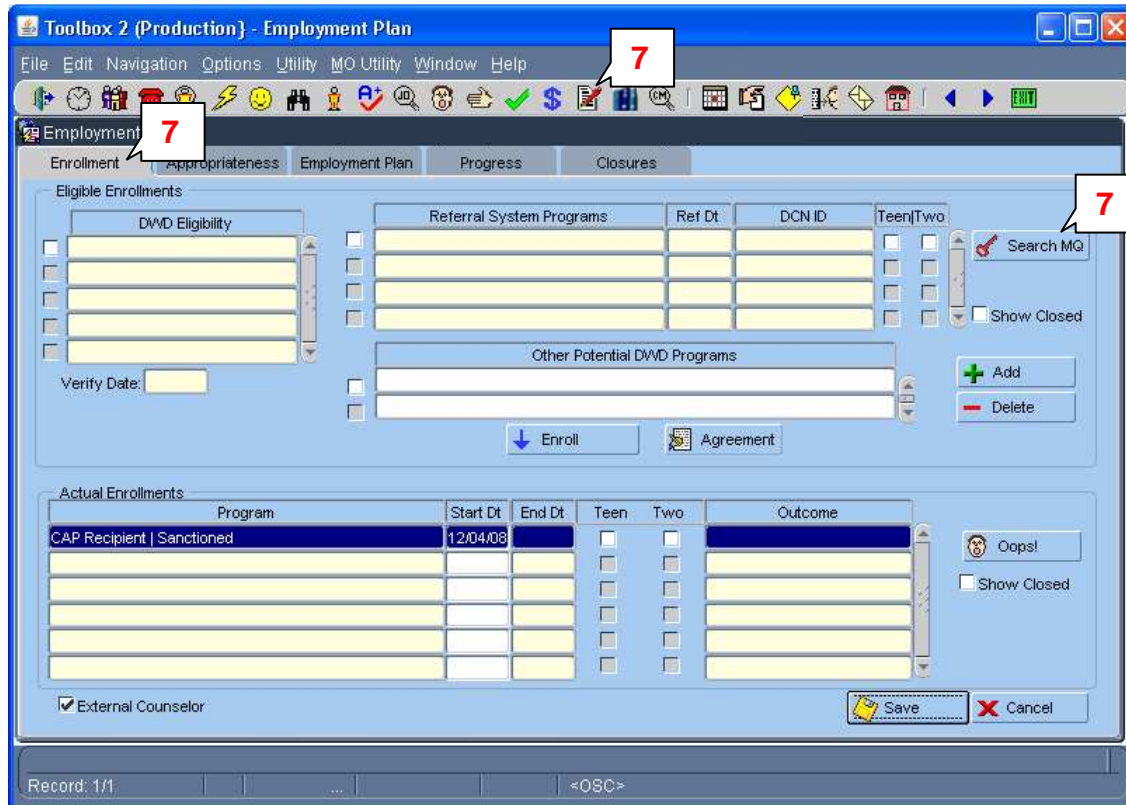
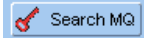


Figure 5: Employment Plan-Enrollment Module/Enrollment Tab

7. Another method for accessing MQ is through the  button on the **Enrollment** tab within the **Employment Plan/Enrollment** module.

Office Locations

Changing the office location you are logged into.

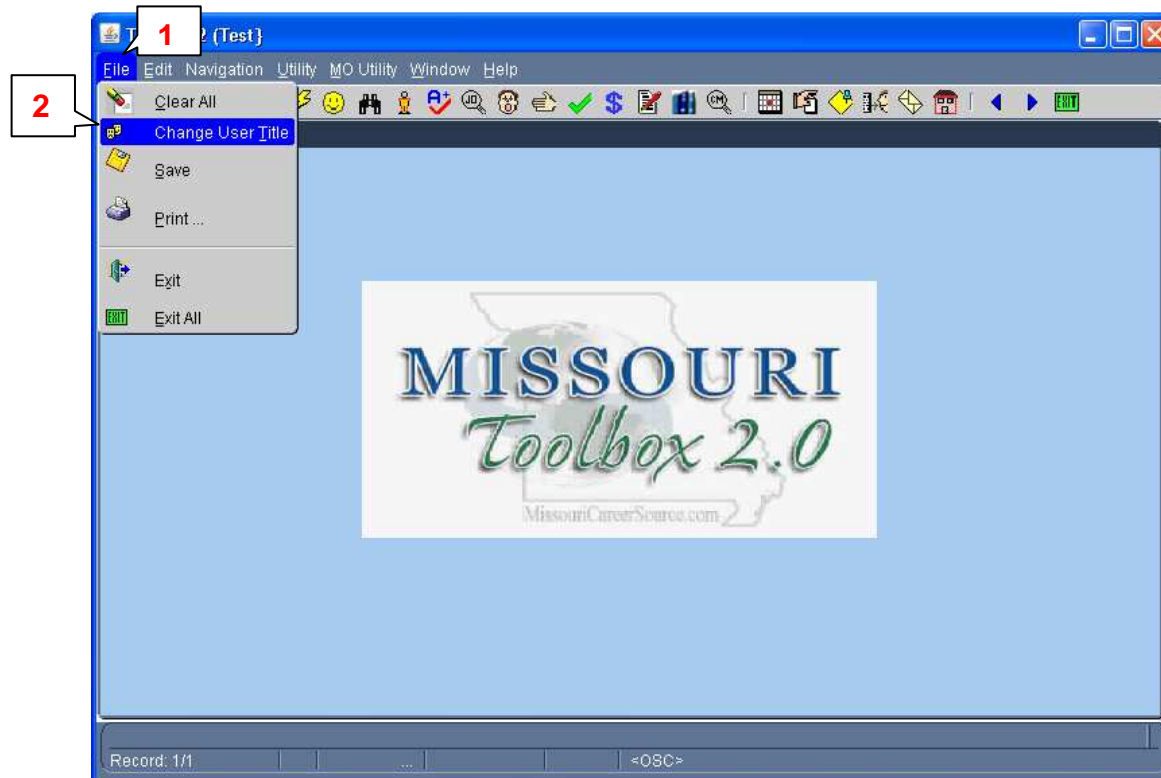


Figure 1: Splash Screen/File Menu/Change User Title Option

Step-by-Step:

1. While on the **Splash** screen, click on the **File** menu.
2. Select the **Change User Title** option. The **Change Agent Hat** screen will appear.

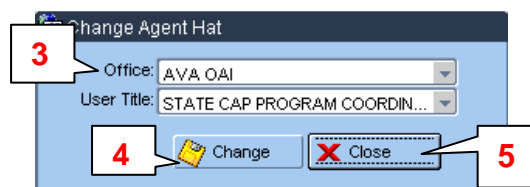


Figure 2: Change Agent Hat Screen

3. Select the appropriate **Office** from the drop-down menu.
4. Click on the **Change** button to make the change
5. Click on **Close**.

Seeker: Searching for a record

Searching for TA applicants or recipients in Toolbox 2.0.

The screenshot shows the 'Toolbox 2 (Production) - Seeker' application window. The 'Find Seeker' tab is selected. The 'Search Criteria' section includes fields for SSN, Phone, Name (Last, First, Middle), App ID, DCN, Web User Id, and Email. A 'Search' button is highlighted with callout 2. The 'Default Screen' section has radio buttons for various options like 'Seeker Info', 'Referral History', 'Assessment', etc. Below the search criteria is a table with columns: Seeker Name, Status, Type, Address, City/State/Zip, and DOB. The table is currently empty.

Figure 1: Find Seeker Module/Find Seeker Tab

Step-by-Step:

1. Click on **Find Seeker** icon (or press Ctrl + N).
2. On the **Find Seeker** tab, enter the appropriate search criteria for the recipient.

The screenshot shows the same 'Toolbox 2 (Production) - Seeker' application window. The 'Find Seeker' tab is selected. The 'Search Criteria' section has 'Last: SMITH' and 'First: JAMES' entered. The 'Search' button is clicked. The table below now displays search results for 'SMITH, JAMES'. Callout 3 points to the first row of the results table.

Seeker Name	Status	Type	Address	City/State/Zip	DOB
SMITH, JAMES	I	SP	RT #4, BOX 280	NEVADA, MO 64772	02/18/1972
SMITH, JAMES	I	SP	8300 BETHEL	SENECA, MO 64865	05/28/1954
SMITH, JAMES	I	S	703 SIKES	SIKESTON, MO 63801	07/19/1940
SMITH, JAMES	I	S	3012 MEADOWLARK	ST LOUIS, MO 63136	08/10/1974
SMITH, JAMES	I	SP	RT 2 BOX 218J	DONIPHAN, MO 63935	10/22/1949
SMITH, JAMES	I	SP	569 MERAMEC AVE	PARK HILLS, MO 63601	02/20/1956
SMITH, JAMES	I	SP	RT 3 BOX 3697D	PIEDMONT, MO 63957	11/26/1968
SMITH, JAMES	I	S	220 VIEBER DRIVE	EUREKA, MO 63025	12/13/1953
SMITH, JAMES	I	S	404 N MAIN STREET	LIBERTY, MO 64068	09/17/1964
SMITH, JAMES	I	S	1019 NO 9TH ST	ST LOUIS, MO 63101	10/08/1980

Figure 3: Find Seeker Module/Find Seeker Tab

3. If the applicant's or recipient's name is used as the search criteria and there are multiple records that match the name, a list of names will be produced in the lower portion of the **Find Seeker** tab. Double click on the applicable name to access the correct record.

Toolbox 2 (Production) - Seeker

File Edit Navigation Options Utility MO Utility Window Help

Seeker Screen - ASHA NICOLE COLLINS No Primary Counselor Assigned

Find Seeker **Seeker Info** Title Edu/Cert Work History Referrals Other Scratch Pad Svc Referral Adv. Query

Name and Address Information

Name: ASHA NICOLE COLLINS Mailing Address: 928 W CENTRAL ST Street Address:

Phone Numbers: Home: (417)496-8612 Cell: Springfield, MO 65802-4021 Email: craziemomma_5@yahoo.com

Personal Information

Date of Birth: 08/22/1979 Age: 30 Gender: F Citizen: Y

Seeker Status

Status: Inactive Date: 10/16/09 Last Update: 10/16/09

Services Provided

Date	Type of Service	Employment Counselor
01/16/09	Assessment	GARY MORRISON
01/15/09	Initial Interview	GARY MORRISON
09/15/08	Job Referral	Counselor Web
09/15/08	Job Referral	Counselor Web

Figure 2: Find Seeker Module/Seeker Info Tab

4. The **Seeker Info** tab displays the applicant's or recipient's basic information.

Seeker: Entering Seeker Information

If an applicant or recipient search did not produce a record(s), you must enter the seeker information. [Staff should search for records by the DCN as this is the only way to determine if there are duplicate records.]

Toolbox 2 (Production) - Seeker Data Entry

File Edit Navigation Utility MO Window Help

Seeker Data Entry

Basic Verifying Desired Emp Job Info Emp His Education Eligibility Skills

Pseudo Last Update:

◆SSN: ◆Date: ◆Entered By:

◆Name:

Address Line 1 Address Line 2 City St Zip

◆Mailing Address: Street Address: Email Address: Verify Email:

Home Cell Work Other

Phone Numbers: ◆Date of Birth: ◆Citizen: ◆Gender:

Refugee: Alien Reg Number: A Asylee: Refugee Entry Date: Homeless: ◆Hispanic/Latino: Asylum Granted Date: ◆Race Codes:

Save Cancel

Figure 1: Seeker Entry Module/Basic Tab

Step-by-Step:

1. Click on **Seeker Entry** icon (or press Ctrl + K).
2. On the **Basic** tab, all fields with a blue diamond (◆) must be completed in order to create a record in Toolbox 2.0.

Seeker Services Tab

The 'Seeker Services' tab contains information such as enrollments, appointments, alerts issued, call-in letters mailed or pending, notification of new case notes added for the Applicant/Recipient, tasks, etc.

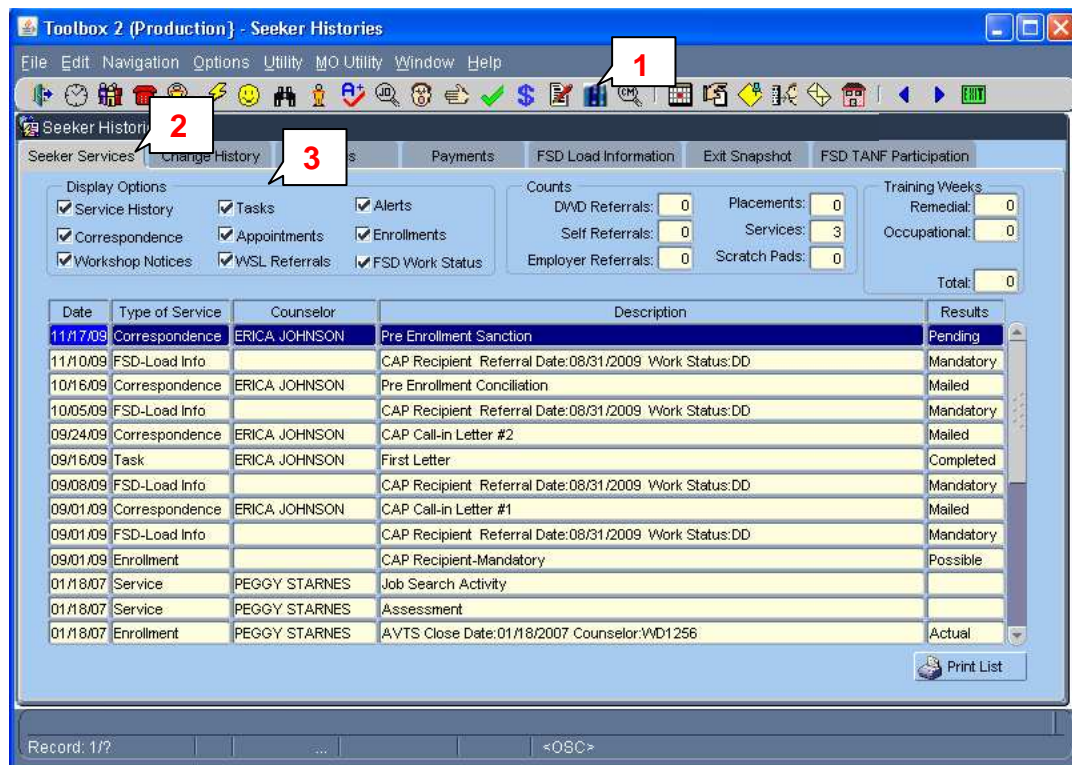



Figure 1: Seeker History Module/Seeker Services Tab

Step-by-Step:

1. Click on the  **Seeker History** icon.
2. Access the **Seeker Services** tab.
3. If you would only like to see certain items, you can “uncheck” any of the **Display Options**.

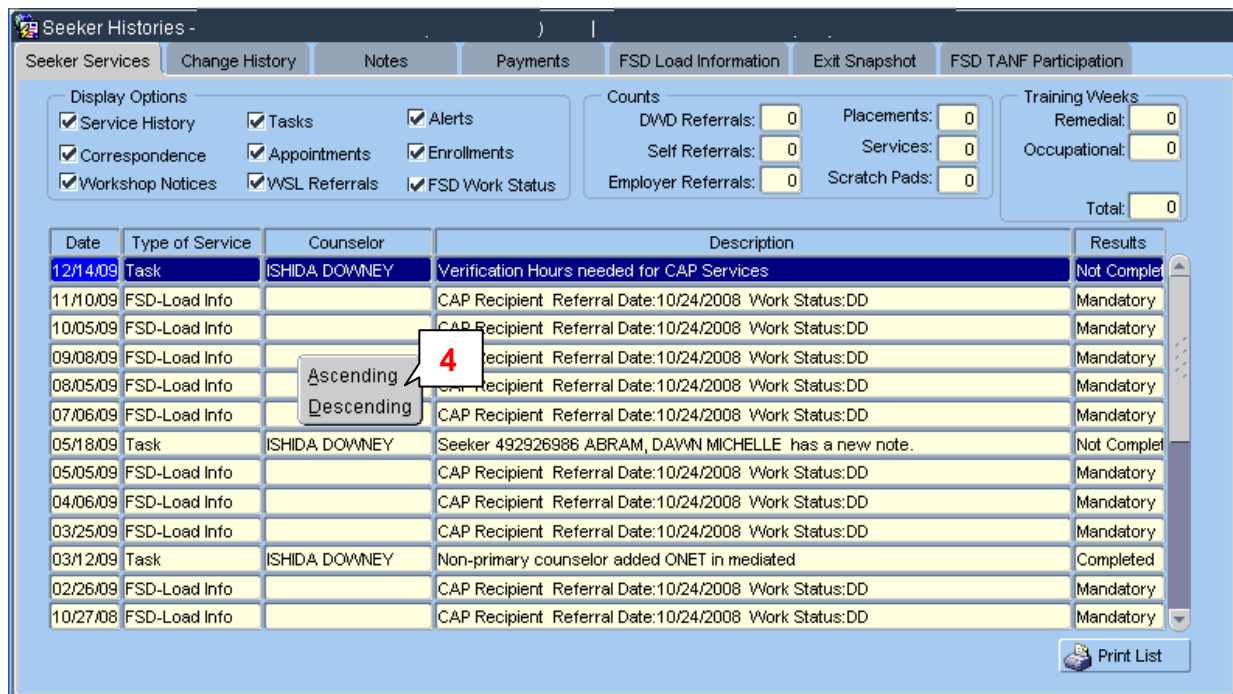


Figure 2: Seeker History Module/Seeker Services Tab/Ascending-Descending Option

- You can right click in the **Date** field for an option to sort the information in 'ascending' or 'descending' order.

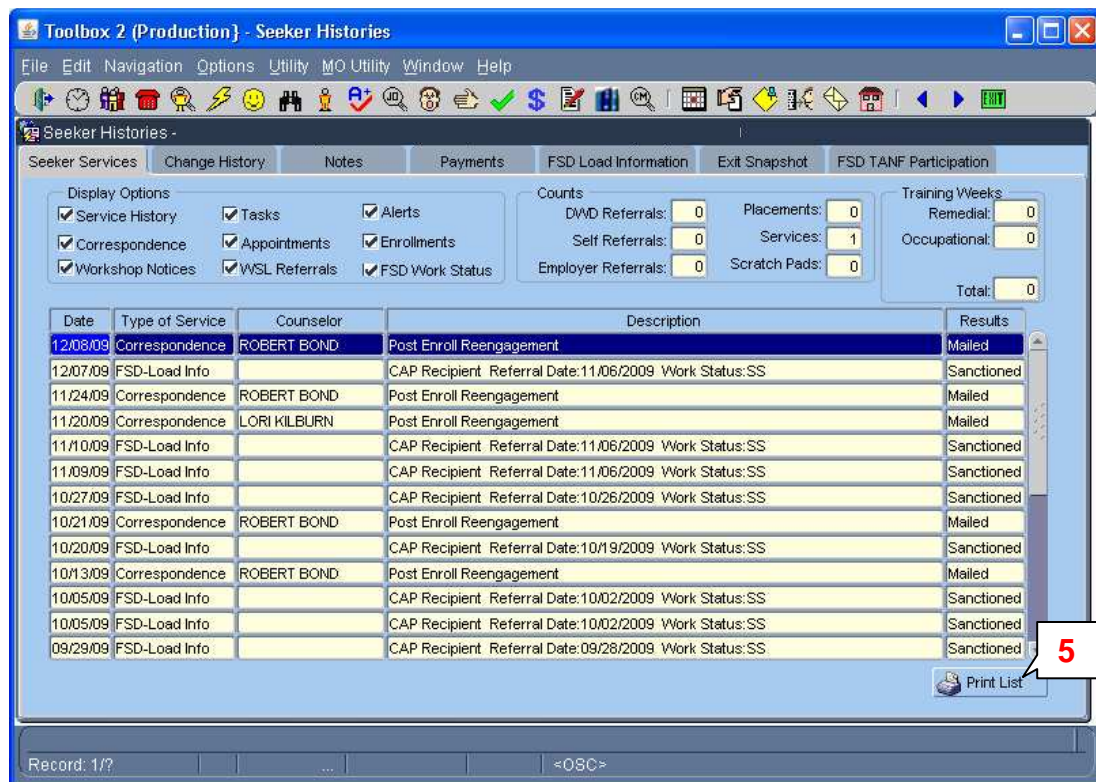



Figure 3: Seeker History Module/Seeker Services Tab/Print List Button

- For a printable list (Seeker History Individual Transaction) of the **Seeker Services** tab information, click the  button.

Seeker History Individual Transaction

5



SSN	Name	Date	Type	Description	Results	
602886458	LILIANA, AGUIRRE	12/04/08	Corr			
		02/18/09	Corr			
		07/09/09	Corr			
		08/06/09	Corr			
		08/21/09	Corr			
		10/13/09	Corr			
		10/21/09	Corr			
		11/20/09	Corr			
		11/24/09	Corr			
		12/08/09	Corr			
		05/18/09	Serv	Assessment		
		12/02/08	Task	Non-primary counselor added ONET in mediated	N	
		12/04/08	Task	Customer Auto-Enrolled in CAP Recipient	Y	
		01/15/09	Task	Seeker 602886458 AGUIRRE, LILIANA, has a new note.	N	
		03/09/09	Task	Seeker 602886458 AGUIRRE, LILIANA, has a new note.	N	
		03/20/09	Task	Seeker 602886458 AGUIRRE, LILIANA, has a new note.	N	
		05/18/09	Task	Non-primary counselor added Employment History in mediated Missouri Career Source	Y	
		05/26/09	Task	Seeker No, Did Not Attend Workshop- Career Success Strategies (Soft Skills) on 05/26/2009.	N	
		08/05/09	Task	Seeker 602886458 AGUIRRE, LILIANA, has a new note.	N	
		09/16/09	Task	Seeker 602886458 AGUIRRE, LILIANA, has a new note.	N	
		09/29/09	Task	FSD has started Sanctioning this customer on CAP.	Y	
Total					21	

Figure 4: Seeker History Individual Transaction List

Services (Activities)

Entering services into the 'Employment Plan' tab.

Figure 1: Employment Plan-Enrollment Module/Employment Plan Tab

Step-by-Step:

1. Click on **Employment Plan/Enrollment** icon.
2. Access the **Employment Plan** tab.
3. Complete the fields of:
 - a. **O*Net** (double-click or press the F2 button),
 - b. **Goal**, and
 - c. **Justification**.
4. Double click in the **Objective** field.

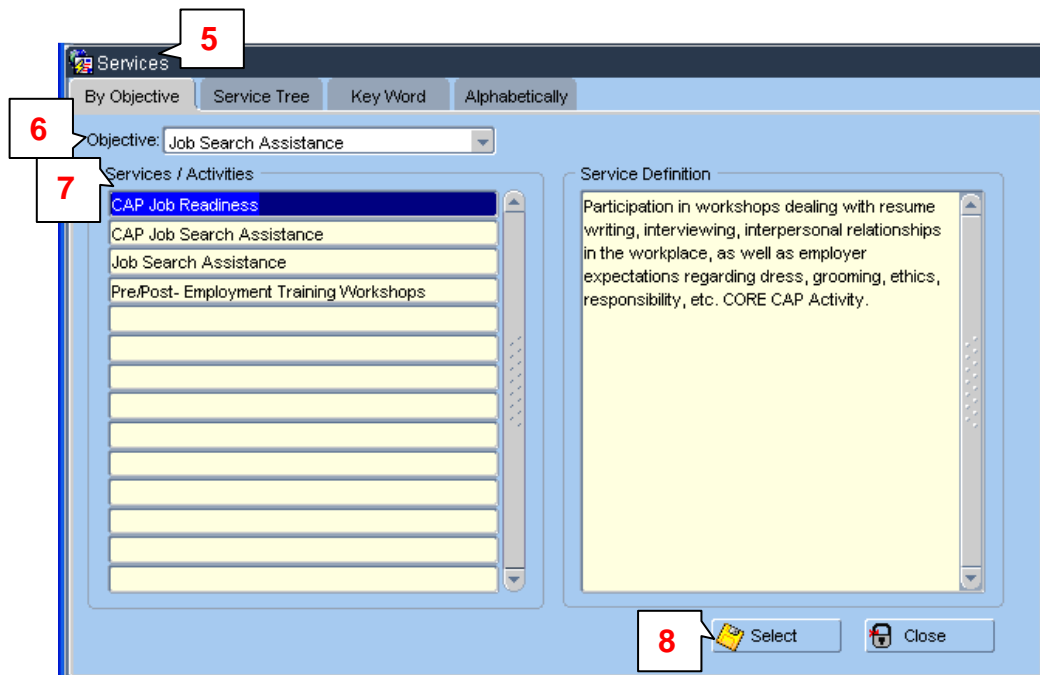



Figure 2: Employment Plan-Enrollment Module/Employment Plan Tab/Services Screen

5. A **Services** screen will pop-up.
6. Select the appropriate **Objective**.
7. A list of **Services/Activities** will appear. Click on the appropriate **Service**. (When a service is highlighted, a brief description will appear in the right field.)
8. Click the  **Select** button. The **Services** screen will close.

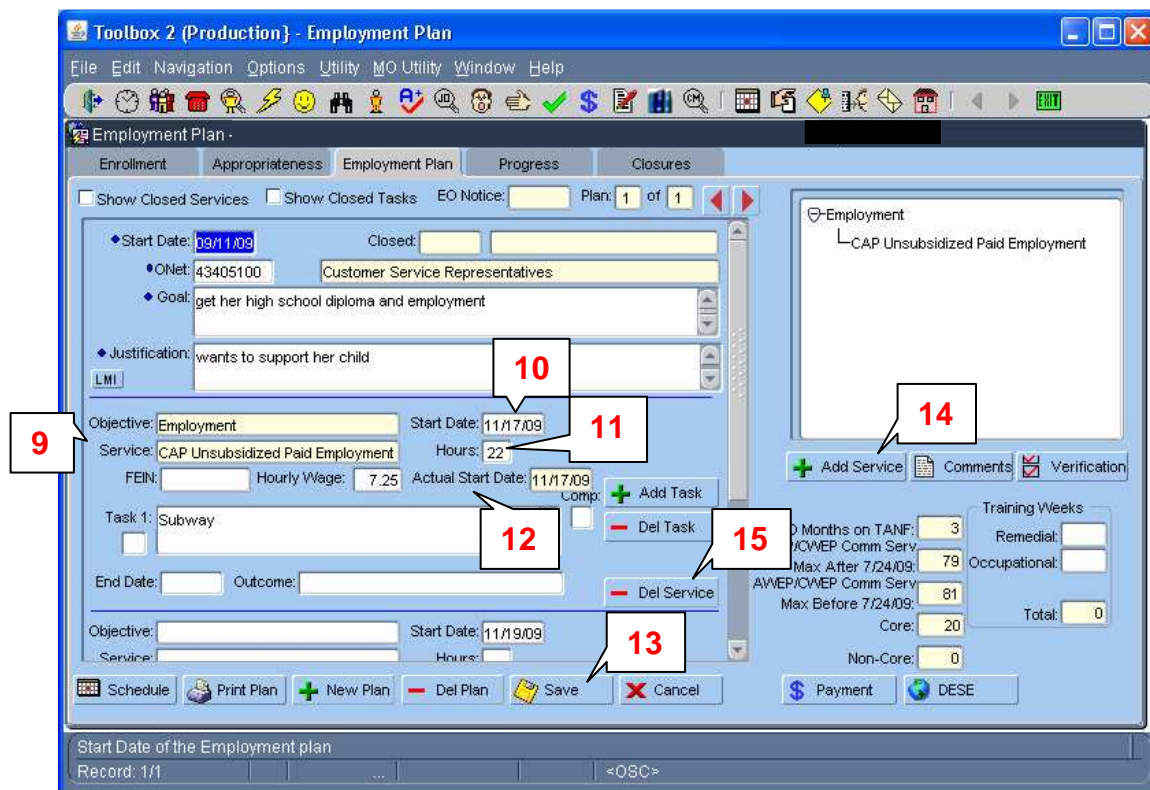

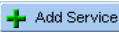
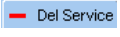


Figure 3: Employment Plan-Enrollment Module/Employment Plan Tab/Services Screen

9. The **Objective** and **Service** fields are completed with the selection made.

10. The **Start Date** field will display the current date. If necessary, change to the correct date.
11. Complete the **Hours** field.
12. Enter an **Actual Start Date**, if applicable, to allow the service to display on the 'Verification' screen for entry of actual hours. [The CAP services that do not require an **Actual Start Date** are 'CAP Assessment', 'CAP Conciliation', 'CAP Trial Participation', and 'CAP Temporary Waivers'.] The **Actual Start Date** must be equal to or after the **Start Date**.
13. Click the  button.
14. If the Employment Plan tab is full, you can press the  button to add additional 'objective' and 'service' fields.
15. If a service is entered in error, you can press the  button to delete the service on the same day it was entered.

Pre-Enrollment Conciliation Service

Entering a 'Pre-Enrollment Conciliation' service for Possible CAP Recipients and Possible CAP Voluntary Recipients.

Figure 1: Notes Module

Step-by-Step:

1. Click on Notes icon.

Date	Note Category	Subject	Counselor	Filw-Up Dt
09/02/08	Customer Cont	CAP Recipient Orientation, No Call, No Show	JENNIFER MILLER	
08/26/08	Customer Cont	Missed Appointment	CINDY CARRICO	
08/13/08	Customer Cont	Immediate Engagement	CINDY CARRICO	
08/04/08	Customer Cont	Scheduled IE CAP Applicant appt.	KIM BATH	
12/12/07	Note Only			
12/12/07	Note Only			
10/23/07	Note Only			
10/23/07	Note Only			
10/23/07	Case Review	Conciliation Note		

Figure 2: Notes for Seeker Screen

2. The Notes for Seeker screen will pop-up.
3. Click the Add button.

The screenshot shows a software window titled "Create Note for Seeker -". The window has a yellow background. At the top left, a callout box labeled "4" points to the window title bar. Below the title bar, there are several fields: "Note Category:" with a dropdown menu showing "Customer Contact" (callout "5a"), "Date:" with a text box showing "09/23/09", and "By:" with a text box showing "MYRA HUHMANN". Below these is the "Subject:" field with the text "Pre-Enrollment Conciliation Service" (callout "5b"). Below the subject field is the "Notes:" field with the text "Conciliation" (callout "5c"). At the bottom left, there is a "Follow-up Date:" field and a checkbox labeled "Print on Save". At the bottom right, there are two buttons: "Save" and "Close".

Figure 3: Create Note for Seeker Screen

4. The **Create Note for Seeker** screen will pop-up.
5. In order for the 'Pre-Enrollment Conciliation Service' to be sent to FSD to generate reports on recipient activities, you must complete the case note as shown above in Figure 3. (Conciliation is not a countable activity for the federal work participation rate.)
 - a. In the **Note Category**, select **Customer Contact** from the drop down menu.
 - b. Enter **Pre-Enrollment Conciliation Service** in the **Subject** field.
 - c. In the **Notes** field, enter **Conciliation**.

Note: The 'Pre-Enrollment Conciliation Service' will remain open and sent to FSD until: 1) The 'Recommend Sanction be Lifted' alert is sent to FSD; 2) The Recipient is enrolled into CAP; or 3) A 'ZZ' referral is received from FSD.

Teen Parent

Identifying a teen parent.

The screenshot shows the 'Toolbox 2 (Production) - Employment Plan' application. The 'Enrollment' tab is selected. The interface includes sections for 'Eligible Enrollments' (with 'DVD Eligibility' and 'Referral System Programs' tables), 'Actual Enrollments' (with a table listing programs like 'CAP Recipient | Mandatory'), and buttons for 'Enroll', 'Agreement', 'Add', 'Delete', 'Save', and 'Cancel'. Callout 1 points to the 'Enrollment' tab. Callout 2 points to the 'Eligible Enrollments' section. Callout 3a points to the 'Teen' checkbox in the 'Referral System Programs' table. Callout 3b points to the 'Teen' checkbox in the 'Actual Enrollments' table.

Program	Start Dt	End Dt	Teen	Two	Outcome
CAP Recipient Mandatory	06/24/11		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	

Figure 1: Employment Plan-Enrollment Module/Enrollment Tab

Step-by-Step:

1. Click on **Employment Plan/Enrollment** icon.
2. The **Enrollment** tab will display.
3. There are two fields (if either is checked) that identify the client as a **Teen Parent** that are located under:
 - a. **Referral System Programs**
 - b. **Actual Enrollments**

Teen Parent

Sending a 'Teen Parent in an Educational Activity' alert to FSD for TA recipients. (This alert is not sent for TA applicants since FSD will be given this information at application.)

Toolbox 2 (Test) - Assessment

File Edit Navigation Options Utility MO Utility Window Help

Assessment-
Employment Education Support System Financial Needs Legal Screening Health/Treatment Basic Skills Tests

Assessment Date: 01/05/09 Last Update Date: 01/05/09

Education History
Highest grade completed?: 09 Currently in School: No
Would you like to obtain your high school diploma or GED? Yes
Do you have a learning disability? No
What did you like about school? the work
What did you dislike about school? teachers
Are there any training programs you started but didn't complete?
Training Program Reason for Leaving Exit Date
Are you interested in more training or skill enhancement?
Describe:
School: NORTH EAST
City: KANSAS CITY State: MO
Major:
Degree: Study Area Completion Date:
Print CAP Assessment

Employment Skills
Aptitude/Ability Tests
Test Type
Test Date
Results:
Education Issues
LEP/ESL:
Describe:
Pell grant status: Yr: Amt:
Describe:
Financial Aid
Licenses and Certificates
Training Completion Certificates
Type License/Certificate Date St
Additional
Save Cancel

Select from the LOV the highest grade the customer completed in school
Record: 1/1 <OSC>

Figure 1: Assessment Module/Education Tab

Step-by-Step:

1. Click on **Assessment** icon.
2. Click on the **Education** tab.
3. Click on the button to access the **School Information Screen**.

School:
Address:
City:
Start date:
End date:
Attendance:
Degree: None
Close

Figure 2: School Information Screen

4. All fields except **End Date** must be completed in order to send the alert. [The **Start Date** must be completed in a mm/dd/yy format.]
5. For the field **Degree**, 'None' must be selected.
6. Click on the button to exit the screen.
7. Once back on the **Education** tab, click on the button to save the information and to send the alert to FSD. This alert will write to the **Seeker Services** tab within the **Seeker History** module.

NOTE: This alert notifies FSD the teen parent is in school so the months while (s)he is in school does not count toward the TA 60-month lifetime limit.

Teen Parent

Sending a 'Teen Parent Not in an Educational Activity' alert to FSD. This alert should only be sent if a Teen Parent had been participating in an education activity and then chose to no longer continue.

Figure 1: Assessment Module/Education Tab

Step-by-Step:

1. Click on **Assessment** icon.
2. Click on the **Education** tab.
3. Click on the to access the **School Information Screen**.

Figure 2: School Information Screen

4. Complete the **End Date** (mm/dd/yy format) field.
5. Update the **Degree** field if appropriate. For the **Degree** field, 'None' can be selected if no degree was obtained. All noted fields must be completed in order to send the alert. [The fields **School**, **Address**, **City**, **Start Date**, and **Attendance** should already be complete from original alert.]
6. Click on the **Close** button to exit the screen.
7. Once back on the **Education** tab, click on the **Save** button to save the information and to send the alert to FSD. This alert will write to the **Seeker Services** tab within the **Seeker History** module.

NOTE: This alert notifies FSD the teen parent is no longer in school and that TA received should count toward the 60-month lifetime limit.

TRE Payments

Authorizing a one-time TRE payment for applicants.

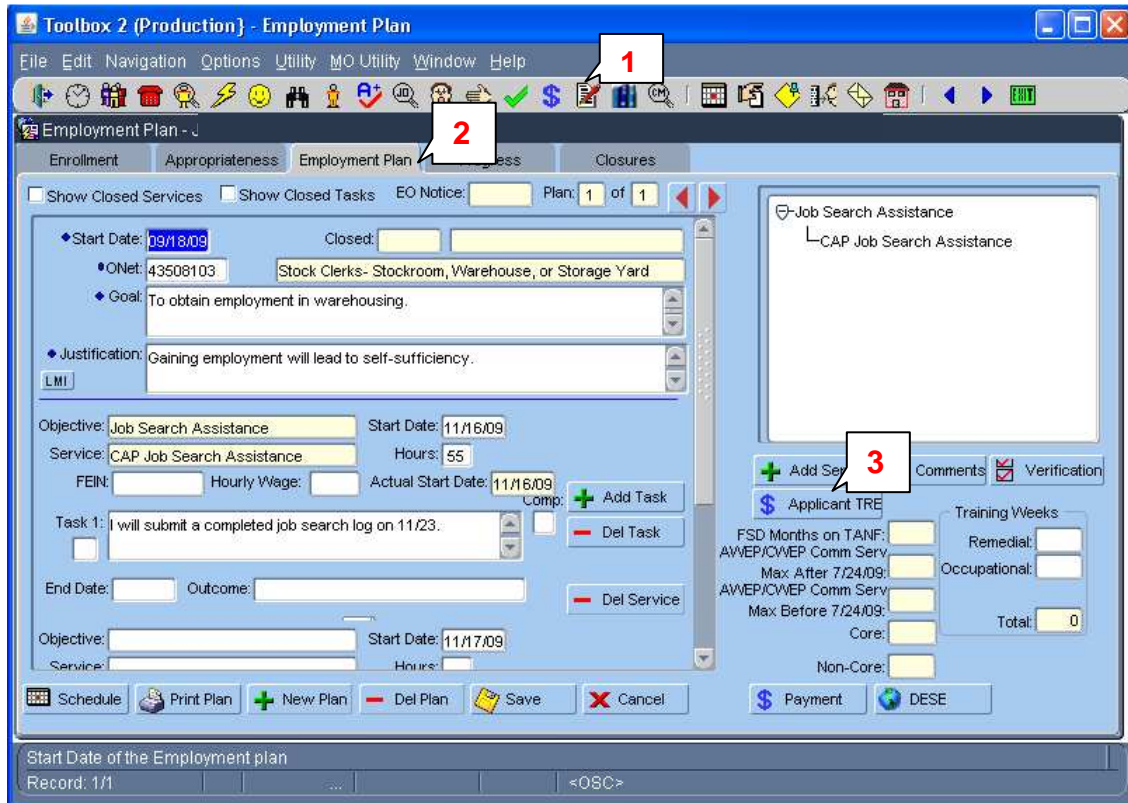



Figure 1: Employment Plan-Enrollment Module/Employment Plan Tab

Step-by-Step:

1. Click on the  **Employment Plan/Enrollment** icon.
2. Click on the **Employment Plan** tab.
3. To issue applicant TRE, click the  button.



Figure 2: Applicant TRE Screen

4. To confirm payment, click the  button.

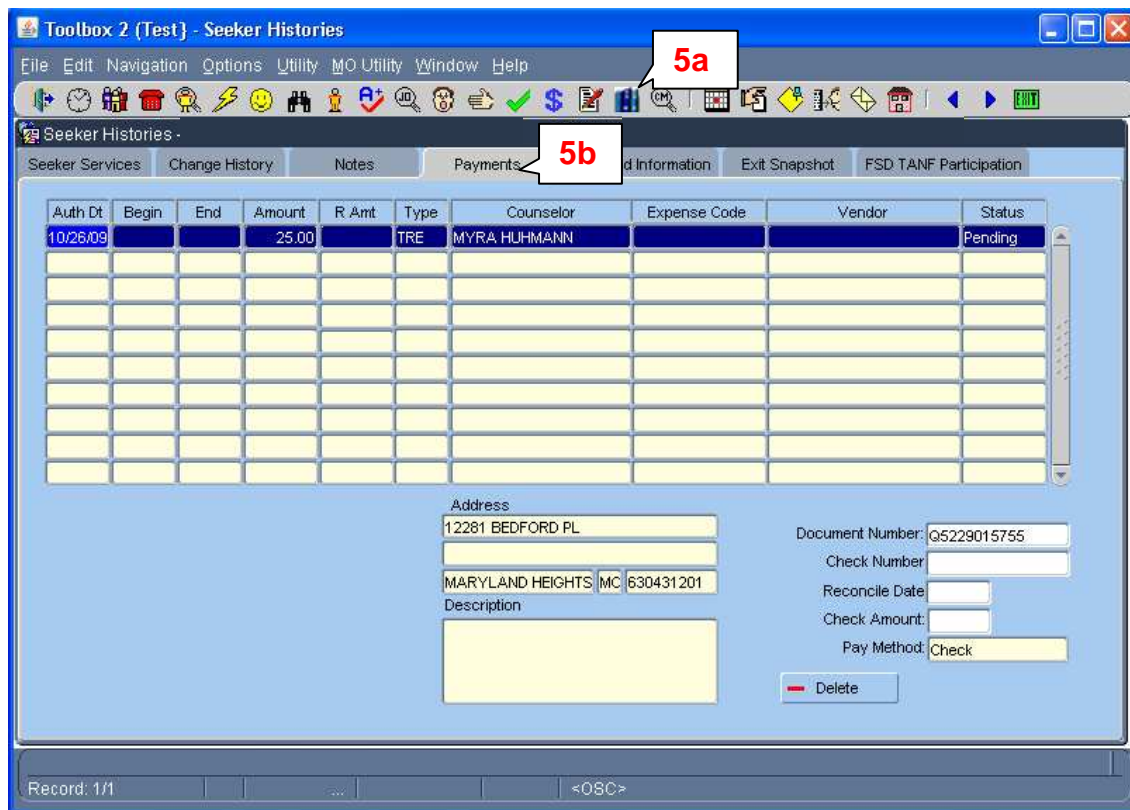



Figure 3: Seeker History Module/Payments Tab

5. To verify the payment was issued:
 - a. Click the  **Seeker History** icon.
 - b. Click on the **Payments** tab. (The **Status** will remain 'Pending' until the TRE is paid, based on the TRE Payment Schedule.)

TRE Payments


Authorizing TRE payments for recipients.

Figure 1: Employment Plan-Enrollment Module/ Employment Plan Tab

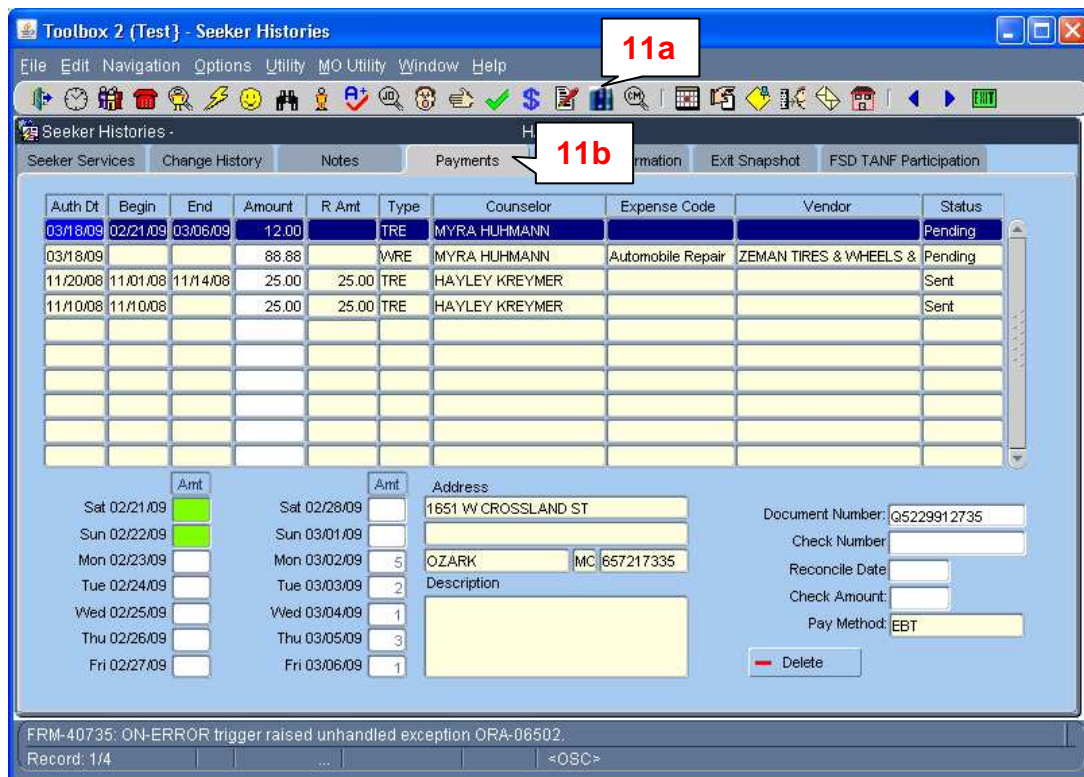
Step-by-Step:

1. Click on **Employment Plan/Enrollment** icon.
2. Click on the **Employment Plan** tab.
3. Click the **Payment** button to access the Payments screen.

Figure 2: Payments Screen/Transportation Tab

4. Select the **Transportation** tab.
5. In the **Date Range** field, select the week TRE should be paid for from the drop-down menu.
6. Once a date range is selected, the **Authorization Date** field will populate with the current date.
7. In the **Payment Detail** (date) fields, enter the appropriate amount of TRE, up to the \$5 maximum, for each eligible day. The dates will populate to the screen, once you have selected the appropriate two-week payment period. (A TRE payment should not be entered for a particular day unless the recipient was in a CAP service for that day and was meeting requirements according to the “TRE” policy.)
8. Double click in the **Service** field(s) to access a list of CAP services available to link to the TRE payment.
9. Enter the amount of the TRE associated with the service into the **Amount** field.
10. Click the  **Save** button.

NOTE: The **Total All TRE's** field indicates the total amount of TRE authorized and sent to the client to date.




11a points to the 'Payments' tab.

11b points to the first row of the payment history table.

Auth Dt	Begin	End	Amount	R Amt	Type	Counselor	Expense Code	Vendor	Status
03/18/09	02/21/09	03/06/09	12.00		TRE	MYRA HUHMAN			Pending
03/18/09			88.88		WRE	MYRA HUHMAN	Automobile Repair	ZEMAN TIRES & WHEELS &	Pending
11/20/08	11/01/08	11/14/08	25.00	25.00	TRE	HAYLEY KREYMER			Sent
11/10/08	11/10/08		25.00	25.00	TRE	HAYLEY KREYMER			Sent

Below the table, there are fields for dates, amounts, address, and document numbers. A 'Delete' button is also present.

Figure 3: Seeker History Module/Payments Tab

11. To verify the payment was issued:
 - a. Click the  **Seeker History** icon.
 - b. Click the **Payment** tab. (The **Status** will remain 'Pending' until the TRE payment is sent to the EBT card, which is 1 week prior to the money being available on the EBT card.)

Two-Parent Button

Identifying a TA applicant or recipient as part of a two-parent household.

The screenshot shows the 'Toolbox 2 (Production) - Employment Plan' application. The 'Enrollment' tab is selected. The interface includes several sections: 'Eligible Enrollments' with 'DVD Eligibility' and 'Referral System Programs' tables; 'Actual Enrollments' table; and a 'Two Parent' button. Numbered callouts indicate the following steps:

- 1. Click on the 'Employment Plan' icon in the toolbar.
- 2. Click on the 'Enrollment' tab.
- 3a. Click on the 'Teen|Two' dropdown in the 'Referral System Programs' table.
- 3b. Click on the 'Two' checkbox in the 'Actual Enrollments' table.
- 4. Click on the 'Two Parent' button.

Program	Start Dt	End Dt	Teen	Two	Outcome
CAP Recipient Mandatory	04/07/08		<input type="checkbox"/>	<input checked="" type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	
			<input type="checkbox"/>	<input type="checkbox"/>	

Figure 1: Employment Plan-Enrollment Module/Enrollment Tab

Step-by-Step:

1. Click on **Employment Plan/Enrollment** icon.
2. The **Enrollment** tab will display.
3. There are two fields that identify the TA applicant or recipient as a part of a **Two Parent** household under:
 - a. **Referral System Programs**
 - b. **Actual Enrollments**
4. There is a **Two Parent** button, to switch between the TA applicant or recipient and the other parent.

5a

5b

5c

Name and Address Information

CRYSTAL LYNN L GREEN

Home: (660)281-5600 Cell: (660)723-5364 Work: Other: (660)596-4874

Mailing Address: 16399 LEGTON LN LOT 9 WARSAW MC 65355-5746

Street Address:

Personal Information

Date of Birth: 07/27/1979 Age: 29 Gender: F Citizen: Y

☐ In School ☐ Disabled ☒ Searchable ☒ Share resume ☐ Undoc Alien ☐ Deceased

Alien Reg #: A LEP: ☐

Veteran Information

Vet Status: N - None Transition: ☐ Recently Separated ☐ Served in Campaign ☐ Print on Summary (Resume) ☐ Service Ended by Disability ☐ Spouse of Deployed Guard/Reserve or spouse deployment ended w/ the past yr

Branch: ☐ Status Verified

Source: ANGELA BURRIS ☐ Partial Seeker ☐ Restricted ☐ Secondary Counselor

Seeker Status

Emp Exchange: Active 05/17/08 Status Date: 01/12/09 Last Update

Case Management: Active Next Appt: Time: UI Ben Year Beg Dt: Inactive Next Task: 01/29/09 MQ

App ID: 13256380 DCN: 0001700394

Possible/Actual Enrollments


Two Parent

Date	Type of Service	Employment Counselor
10/06/08	Assessment	DAWN DECKER
09/29/08	Assessment	DAWN DECKER
06/11/08	Assessment	BROOKE MCKINNEY
05/30/08	Job Referral	RUTH LESMEISTER

Web Info Save Cancel

Seeker's first name
Record: 1/1

Figure 2: Find Seeker Module/Seeker Info Tab

5. To locate the other two-parent button,
 - a. **Find Seeker** ,
 - b. **Seeker Info** tab, and
 - c. **Two Parent** button.

Entering the Default O*Net Code for Two-Parent Households

Using the default O*Net code (10-0000.00) when a two-parent household is referred to CAP for Immediate Engagement and only one parent complies. Also applies to conversion records. This information is also explained in the 'Default O*Net Policy'.

If approved for TA, both recipients will be referred to CAP (unless one or both meet an exemption/exclusion). In order to enter the 'CAP Conciliation' service on the Employment Plan tab for the parent who did not comply, the O*Net code field must be completed with the Generic O*Net code.

The screenshot shows the 'Toolbox 2 (Production) - Employment Plan' application. The 'Enrollment' tab is selected. The 'Start Date' is 02/27/03. The 'O*Net' field contains 10000000. The 'Goal' and 'Justification' fields both contain 'Converted'. The 'Comments' field contains 'N/A Two Parents household, 20 hours required.' The right side of the window shows various options like 'Add Service', 'Comments', 'Verification', and 'Training Weeks'.

Figure 1: Employment Plan-Enrollment Module/Enrollment Tab

Step-by-Step:

1. Click on **Employment Plan/Enrollment** icon.
2. On the **Enrollment** tab, enter 10-0000.00 into the **O*Net** field.
3. Replace the word 'Converted' with 'Conciliation' in the:
 - a. **Goal** field and
 - b. **Justification** field.

Verification Screen

Actual, projected, excused, and holiday hours are entered on the 'Verification' screen. Hours for the 1st through the 15th of the month must be entered no later than the 30th of the month. Hours for the 16th through the end of the month must be entered no later than the 15th of the following month. For complete instructions, refer to the "CAP Actual Hours" document on WorkSmart at <https://worksmart.ded.mo.gov>, 'Services/Programs', 'CAP/TANF', and 'Memos/Letters/Info Alert'.

NOTE: The 'Client Mass Verification Entry' screen located under the 'Options' menu is only used as a tool to review hours entered for a case load. Do **not** use this screen for entry of actual hours.

Verification Screen (Actual Hours)

Below are instructions for entering actual hours.

Figure 1: Employment Plan-Enrollment Module/ Employment Plan Tab

Step-by-Step:

1. Click on **Employment Plan/Enrollment** icon.
2. Click on the **Employment Plan** tab and complete the fields of:
 - a. Objective,
 - b. Service,
 - c. Start Date,
 - d. Hours, and
 - e. Actual Start Date.
3. Click the **Save** button.
4. Click on the **Verification** button to access the 'Verification' screen.

Service	Start Dt	Exp Hrs	03/06	03/13	03/20	03/27	Avg.
CAP Job Search Assistance	03/02/09	20	0	0	0	0	0
CAP Unsubsidized Paid Employment	03/10/09	20	0	0	0	0	0
Excused			0	0	0	0	0
Holiday			0	0	0	0	0
			0	0	0	0	0
			0	0	0	0	0

Documentation: 03/06: []

AWEP/CWEP & Comm. Serv. Max: 75 Core: 20 Non-Core: 0

[Save] [Close]

Figure 2: Verification Screen

5. From the **Monitor Period** field, select the appropriate month that you are going to enter hours.
6. To enter **actual hours** for a service (example CAP Job Search Assistance), double click in the desired **Week Ending** date field. [The system only allows access to Week Ending Date fields for dates within the services Start and End dates.]

Day	Hrs.
Saturday (02/28)	
Sunday (03/01)	
Monday (03/02)	4
Tuesday (03/03)	4
Wednesday (03/04)	4
Thursday (03/05)	4
Friday (03/06)	4

Save Cancel

Figure 3: Daily Fields Screen

7. The week displays.
8. Enter hours into the appropriate days.
9. Click the Save button to save the hours entered, close the screen.

Service	Start Dt	Exp Hrs	Week Ending				Avg.
			03/06	03/13	03/20	03/27	
CAP Job Search Assistance	03/02/09	20	20				5
CAP Unsubsidized Paid Employment	03/10/09	20					0
Excused			0	0	0	0	0
Holiday			0	0	0	0	0
			20	0	0	0	5

Documentation 03/06:

AWEP/CWEP & Comm. Serv. Max: 75 Core: 20 Non-Core: 0

Save Close

Figure 4: Verification Screen

10. Once all hours are entered for the month, click the Save button.
11. Click the Close button to close the screen.

Verification Screen (Projected Hours)

Below are instructions for entering projected hours for paid activities.

Figure 1: Employment Plan-Enrollment Module/ Employment Plan Tab

Step-by-Step:


1. Click on **Employment Plan/Enrollment** icon.
2. Click on the **Employment Plan** tab and complete the fields of:
 - a. Objective,
 - b. Service,
 - c. Start Date,
 - d. Hours, and
 - e. Actual Start Date.
3. Click the **Save** button.
4. Click on the **Verification** button to access the 'Verification' screen.

Service	Start Dt	Exp Hrs	Week Ending				Avg.
			03/06	03/13	03/20	03/27	
CAP Job Search Assistance	03/02/09	20	20				5
CAP Unsubsidized Paid Employment	03/10/09	20					0
Excused			0	0	0	0	0
Holiday			0	0	0	0	0
			20	0	0	0	5

Figure 2: Verification Screen

5. From the **Monitor Period** field, select the appropriate month that you are going to enter hours.
6. To enter projected hours for a service (example CAP Unsubsidized Employment), double click in the desired **Week Ending** date field. [The system only allows access to Week Ending Date fields for dates within the services Actual Start and End dates.]

Figure 3: Baseline Weeks Screen



7. The **Baseline Weeks** display.
8. Enter the number of hours worked in the first and second week of employment as the “baseline”. If you only have one week of documentation, enter the same number for both weeks. [The “baseline” entry automatically averages and projects hours for the remainder of the six-month period.]
9. Click the  **Save** button to save the hours entered and close the screen.

Service	Start Dt	Exp Hrs	Week Ending					Avg.
			03/06	03/13	03/20	03/27		
CAP Job Search Assistance	03/02/09	20	20				5	
CAP Unsubsidized Paid Employment	03/10/09	20		16	24	20	15	
Excused			0	0	0	0	0	
Holiday			0	0	0	0	0	
			20	16	24	20	20	

Documentation
03/13:

AWEP/CWEP & Comm. Serv. Max: Core: Non-Core:

Figure 4: Verification Screen

10. On the ‘Verification’ screen, the baseline hours appear in red. Click the  **Save** button to save the hours entered.
11. Click the  **Close** button to close the screen.

Verification Screen (Self-Employment)

Below are instructions for entering self-employment hours.

Figure 1: Employment Plan-Enrollment Module/ Employment Plan Tab

Step-by-Step:

1. Click on **Employment Plan/Enrollment** icon.
2. Click on the **Employment Plan** tab and complete the fields of:
 - a. Objective,
 - b. Service,
 - c. Start Date,
 - d. Hours, and
 - e. Actual Start Date.
3. Click the **Save** button.
4. Click on the **Verification** button to access the 'Verification' screen.

Figure 2: Verification Screen

5. From the **Monitor Period** field, select the appropriate month that you are going to enter hours.
6. To enter projected hours for a CAP Self Employment, double click in the desired **Week Ending** date field. [The system only allows access to Week Ending Date fields for dates within the services Actual Start and End dates.]

Monthly

Net Income: 1500

Save Cancel

Figure 3: Monthly Net Income Screen

7. The **Monthly** screen will display.
8. Enter the applicant's or recipient's monthly net income. [The monthly net income divided by the federal minimum wage (currently \$7.25) divided by the average number of federal weeks (4.3) in the month will project the applicant's or recipient's hours for the next six months.]
9. Click the Save button to save the entered income, close the screen, and return to the 'Verification' screen.

Monitor Period: 02/2009

Service	Start Dt	Exp Hrs	Week Ending				Avg.
			02/06	02/13	02/20	02/27	
CAP Self Employment	02/10/09	40		49	49	49	37
Excused					0	0	0
Holiday					0	0	0
							0
				49	49	49	37

Documentation
02/06:

AWEP/CWEP & Comm. Serv. Max: 107 Core: 50 Non-Core: 5

Save Close

Figure 4: Verification Screen

10. On the 'Verification' screen, the baseline hours appear in red and the projected hours appear in pink. Click the Save button.
11. Click the Close button.

Verification Screen (Excused Absences/Holiday)

Below are instructions for entering excused absences and holiday for unpaid activities.

Figure 1: Employment Plan-Enrollment Module/ Employment Plan Tab


Step-by-Step:

1. Click on **Employment Plan/Enrollment** icon.
2. Click on the **Employment Plan** tab and complete the fields of:
 - a. Objective,
 - b. Service,
 - c. Start Date,
 - d. Hours, and
 - e. Actual Start Date.
3. Click the **Save** button.
4. Click on the **Verification** button to access the 'Verification' screen.

Figure 2: Verification Screen



5. From the **Monitor Period** field, select the appropriate month that you are going to enter hours.
6. To enter hours for Excused Absences or Holidays, double click in the desired **Week Ending** date field. [The system only allows access to Week Ending Date fields for dates within the services Actual Start and End dates.]

Figure 3: Daily Fields Screen

7. This will bring up a screen of daily fields corresponding the Week Ending date.
8. Enter hours into the appropriate daily field(s).
9. Click the  Save button to save the hours entered and close the screen.

Service	Start Dt	Exp Hrs	Week Ending				
			11/06	11/13	11/20	11/27	Avg.
CAP Occupational/Vocational Education Tr	08/20/09	26					0
Excused			0	0	0	0	0
Holiday			0	0	0	0	0
			0	0	0	0	0

Figure 4: Verification Screen



10. Once all hours are entered for the month, click the  Save button.
11. Click the  Close button.

Work History

Entering a Work History.

Figure 1: Assessment Module/Employment Tab

Step-by-Step:

1. Click on  **Assessment** icon.
2. Click on the **Employment** tab.
3. Click on the  **Add** button.
4. Complete the fields of:
 - a. **Employer**,
 - b. **City**,
 - c. **St** (State),
 - d. **Job Title**,
 - e. **Start Date** (mm/dd/yy format), and
 - f. **End Date** (mm/dd/yy format).
 - g. The **Months** field will auto calculate based on the 'Start Date' and 'End Date'.
5. In the **Per** field, type the pay frequency (daily, hourly, monthly, weekly, and yearly).
6. In the **Salary** field, type the amount of pay based on the frequency indicated in the **Per** field.
7. Complete the **Hrs. Wk** (Hours per Week) field.
8. Complete the **Job Description** field.

Verifying a Work History

Entering verification of employment to send the 'Employment Obtained' alert to FSD.

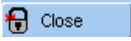
Figure 1: Assessment Module/ Employment Tab

Step-by-Step:

1. Click on **Assessment** icon.
2. Click on the **Employment** tab.
3. Click on the button .

Figure 2: Work History Screen

4. The **Work History** screen will display.
5. If not already complete, enter information into the fields of:
 - a. **Employer Name**,
 - b. **ID** (if information is available),
 - c. **Address**,
 - d. **City-St-Zip**,
 - e. **Employer Phone**,
 - f. **First Check Date**,

- g. **Start Date**,
 - h. **Type** (Subsidized, Unsubsidized Employment, OJT, Work Study, Americorp/Vista Stipend, Tips or Bonus, Compensation in Lieu of Wages, Self Employment, or Commission),
 - i. **Salary Amount**, and/or
 - j. **Pay Frequency** (Bi-Monthly, Bi-Weekly, Monthly, Semi-Monthly and Weekly).
6. For the field of **Verified Employment**, either Verified or Unverified must be selected.
7. Click on the  button to send the alert.

Terminating a Work History

Entering termination of employment to send the 'Verification of Termination' alert to FSD.

The screenshot shows the 'Toolbox 2 (Test) - Assessment' window. The 'Assessment' icon in the top toolbar is highlighted with a red box labeled '1'. The 'Employment' tab in the left sidebar is highlighted with a red box labeled '2'. The green checkmark button in the 'Employment History' section is highlighted with a red box labeled '3'. The 'Employment History' section contains a table with columns for Employer, City, and St. The table has one row with 'Boonland', 'Charleston', and 'MO'. Below the table are fields for Job Title, Start Date, End Date, Months, Per, Salary, and Hrs. Wk. The 'Job Description' field contains 'Cashier, stock shelves'. The 'Current Employment' section has fields for 'Currently Working', 'When are you able to work', 'Looking for work', 'Type of work', 'Longest Worked Employer', 'Why Left', 'Applied and Not Hired', 'Can't Look/Accept Job', and 'Quit or Fired Reason'. The 'Job Seeking Skills' section has fields for 'Do you have a resume?', 'Which methods worked best for you?', 'Describe your typical interview', and 'Do you need help preparing for interviews?'. The 'Job Keeping Skills' section has fields for 'Were you able to get to work on time?', 'Did you work most scheduled work hours?', 'Describe your working relationship with your co-workers/supervisor', 'What type of jobs have you liked in the past and what are you interested in?', 'Describe what you liked most about your last job', 'Describe what you liked least about your last job', and 'LMI vs. Potential Earnings'. The 'Print CAP Assessment' button is at the bottom left, and the 'Save' and 'Cancel' buttons are at the bottom right.

Figure 1: Assessment Module/Employment Tab

Step-by-Step:

1. Click on **Assessment** icon.
2. Click on the **Employment** tab.
3. Click on the button to access the **Work History** screen.

The screenshot shows the 'Work History' screen. The 'Employer Name' field contains 'Walmart'. The 'Address' field contains '123 Stadium Boulevard'. The 'City, St, Zip' fields contain 'Jefferson City', 'MO', and '65109'. The 'Employer Phone' field contains '(573)635-8283'. The 'Start Date' field contains '11/26/08' and the 'End Date' field contains '03/01/09'. The 'Check Date' field contains '12/15/08'. The 'Type' field contains 'Unsubsidized Employment'. The 'Pay Frequency' field contains 'Monthly'. The 'Verified Employment' section has radio buttons for 'Verified' and 'Unverified'. The 'Reason For Leaving' dropdown menu contains 'Quit'. The 'Verified Termination' section has radio buttons for 'Verified' and 'Unverified'. The 'Close' button is at the bottom right.

Figure 2: Work History Screen

4. Complete the **End Date** field.
5. For the **Reason for Leaving** (Layoff, Quit, Fired, Job Ended, or Other) field, select the reason for the termination of employment from the drop down menu.
6. In the **Verified Termination** field, select either Verified or Unverified.
7. Click on the **Close** button to send the alert.

Work Related Expense (WRE) Payments

Authorizing Work Related Expense (WRE) payments for recipients.

Figure 1: Employment Plan-Enrollment Module/ Employment Plan Tab

Step-by-Step:

1. Click on **Employment Plan/Enrollment** icon.
2. Click on the **Employment Plan** tab.
3. Click the **Payment** button to access the Payments screen.

Figure 2: Payments Screen/Work Tab

4. The **Work** tab will display.
5. The **Authorization Date** will default to the current date.
6. Select the appropriate vendor by double clicking or pressing the F2 key while in the **Vendor** field for a list of options.
7. The **Available Amount** field displays the remaining amount of WRE available for the recipient. [The maximum amount of WRE is \$350 per rolling 12-month period.]
8. In the **Pay Amount** field, enter the amount of WRE to be issued to the recipient.
9. From the drop down menu in the **Pay Expense** field, select the type of expense the WRE is covering.
10. In the **Description** field, enter a description of the WRE payment.
11. Double click in the **Service** field(s) to access a list of CAP services available to link to the WRE payment. [This function is not fully developed and its completion is optional.]
12. Enter the amount of the WRE associated with the service into the **Amount** field. [This function is not fully developed and its completion is optional.]
13. The **Total WRE Authorized** field indicates the total amount of WRE issued to the recipient in the past 12 months. The maximum amount of WRE is \$350 for the previous 12-month period. Therefore, Toolbox 2.0 looks at the previous 12 months to determine the funding available.

For example, it is September 15, 2009. Toolbox 2.0 will look to see what WRE payments were issued between September 15, 2008 – September 15, 2009 to calculate the available balance. If the following payment were issued: 9/25/08 - \$100 and 8/15/09 - \$50, there is \$200 available on 9/15/09. [The maximum WRE that can be issued per 12 month period is \$350. In this example, the client started with a \$350 balance. The \$100 and \$50 payment would both be deducted and leave a balance of \$200. However, on September 25, 2009, the \$100 from the 9/25/08 payment would again be available to make the balance of WRE available \$300.]

The screenshot shows the 'Toolbox 2 (Test) - Seeker Histories' application window. The 'Payments' tab is selected, displaying a table with the following data:

Auth Dt	Begin	End	Amount	R Amt	Type	Counselor	Expense Code	Vendor	Status
03/18/09			88.88		WRE	MYRA HUHMANN	Automobile Repair	ZEMAN TIRES & WHEELS &	Pending
11/20/08	11/01/08	11/14/08	25.00	25.00	TRE	HAYLEY KREYMER			Sent
11/10/08	11/10/08		25.00	25.00	TRE	HAYLEY KREYMER			Sent

Below the table, there are input fields for 'Address', 'Description' (containing 'WRE is request to fix flat tire'), 'Document Number', 'Check Number', 'Reconcile Date', 'Check Amount', and 'Pay Method' (set to 'Check'). There are also 'Delete' and 'Print Voucher' buttons.

Figure 3: Seeker History Module/Payments Tab

14. To verify the payment was issued, click the **Seeker History** icon

15. Click on the **Payments** tab.
16. The **Status** will remain 'Pending' until WRE payments are reconciled.

Reconciling Payments

Reconciling WRE payments. Only users with authorized permissions may perform this functionality.

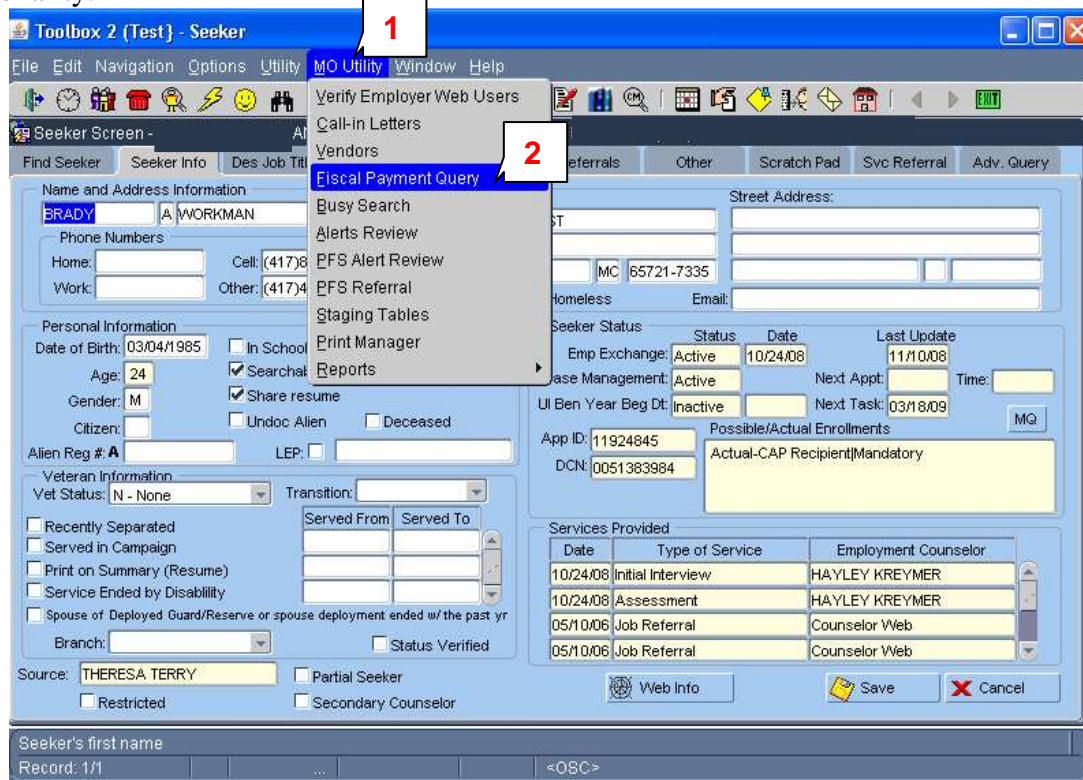


Figure 1: MO Utility Menu/Fiscal Payment Query Option

Step-by-Step:

1. Click on the **MO Utility** MO Utility menu.
2. Select the **Fiscal Payment Query**.

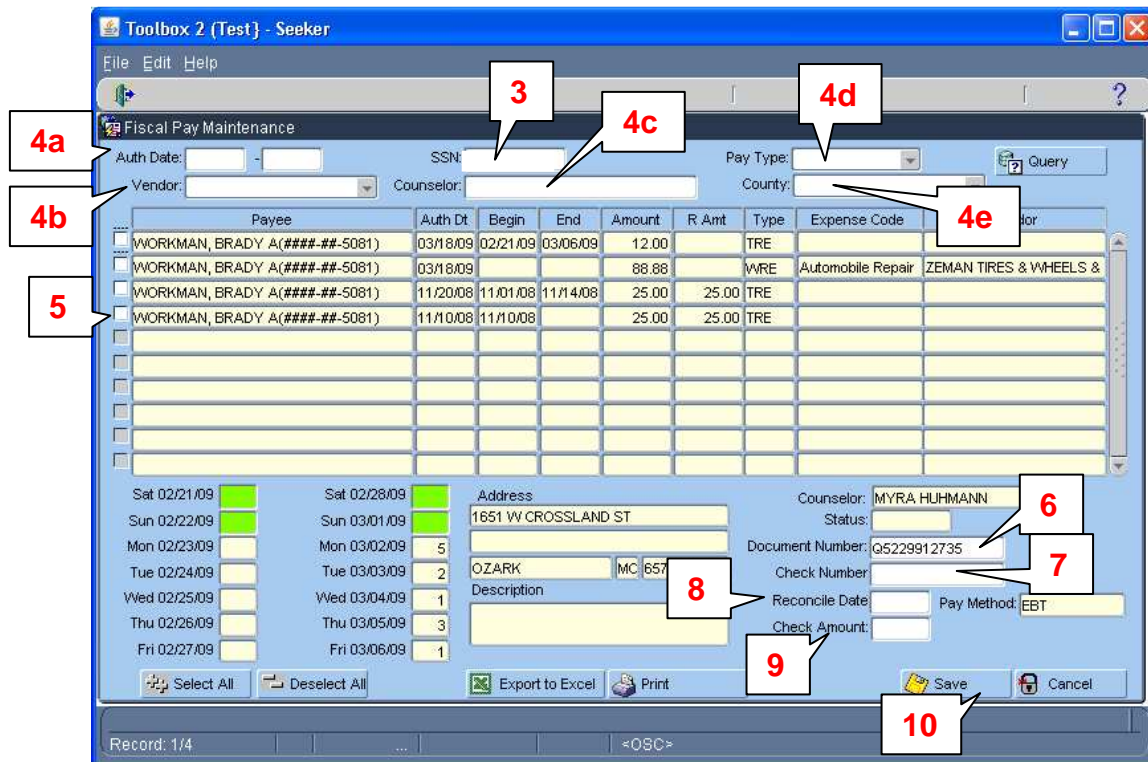
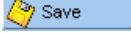


Figure 2: Fiscal Pay Maintenance

3. Use the **SSN** field to locate a specific record.
4. If you are reconciling multiple records, you can also use the fields of:
 - a. **Auth Date**,
 - b. **Vendor**,
 - c. **Counselor**,
 - d. **Pay Type**, and/or
 - e. **County**.
5. From the list of payments, highlight the payment you want to reconcile.
6. Complete the **Document Number** field.
7. Complete the **Check Number** field.
8. Enter the appropriate date into the **Reconcile Date** field.
9. In the **Check Amount** field, enter the actual amount of payment issued to pay for the WRE.
10. Click the  button.